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Federal Robotic Process Automation Community of Practice Welcome Letter

May 8, 2019

GSA is excited to announce the formation of a Federal Community of Practice (CoP) for Robotic Process Automation (RPA). The federal RPA community has expanded a great deal in the past two years. This new working group will help agencies obtain the many benefits of RPA faster and more efficiently by sharing information on use cases, technical options and best practices for implementation and operations. The information will be compiled and continually updated in a Federal RPA Implementation & Operations Guide. CoP meetings will feature guest speakers, but the Guide will be the heart of the CoP, serving as its primary tool for accelerating use of RPA in the federal government.

The charter below provides more information on the CoP. The CoP is organized into RPA Practice Area Teams, e.g., Security, Governance. These teams will develop specific information and guidance for all agencies. You will receive a brief survey shortly requesting that you select one or more teams to join or lead.   Shortly thereafter you will be invited to the first meeting.

Meetings will be held monthly at GSA Headquarters, 1800 F St. NW or at volunteering host agencies, with teleconferencing available for remote attendees. Those based in the Washington, D.C. area are encouraged to attend in person.

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- Enter your first name and last name
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- Then first name, last name - example: GSA.johnsmith@gmail.com (mandatory)
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- Write to rpa@gsa.gov from their new GACA account informing us that the account has been set up

Federal government employees who have not received this welcome letter may write to fedrpa-subscribe-request@listserv.gsa.gov to join the CoP.   The content of the email does not matter.

Please also visit our CoP homepage here on digital.gov.

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Federal Robotic Process Automation Community of Practice

Draft Charter

May 8, 2019

I. Purpose

The purpose of the federal Robotic Process Automation (RPA) Community of Practice (CoP) is to accelerate the use of RPA across the federal government in order to benefit from cost-effectively automating manual, repetitive, and rule-based operations. The benefits include:

1. Advancing agency missions and improving employee satisfaction, retention and recruitment by shifting from low-value to high-value work (supports President's Management Agenda, Cross-Agency Priority Goal 6);
2. Increasing the efficiency of existing operations and achieving more than can be done with current resources, e.g., more frequent and timely processing, improved data quality through full reconciliation and cleanse, streamlining procurements and licensing;
3. Reducing costs over time by creating capacity to maintain quality of service and absorb new work requirements without new hiring or replacement of retirees;
4. Reducing processing errors and consequent costs of rework, delay and customer dissatisfaction;
5. Reducing process cycle times and thereby improving service to internal customers and citizens;
6. Improving internal controls, regulatory compliance and auditability;
7. Improving security and privacy by automating and securing handling of sensitive data and reducing vulnerability to harmful action; and
8. Complementing IT architecture by automating data entry and other manual processing that occurs around and between core systems.

These benefits cut across all functional areas in government, including financial operations, acquisition, human resources, citizen services, IT operations, etc. The CoP will achieve these ends through information sharing and identification and definition of options, best practices, methods and standards for RPA implementation and operations. The CoP will not set policy, but policy-setting agencies are encouraged to participate and make use of the community's base of knowledge, information and experience.

II. Structure

The Executive Sponsors of the CoP are the GSA Chief Financial Officer and Technology Transformation Service (TTS) Director.   The CoP will be chaired by the GSA RPA Program Manager. The Chair will recommend Co-Chairs from agencies, who will also be approved by the GSA CFO and TTS Director.

The Chair and Co-Chairs will facilitate meetings and manage membership and information through the infrastructure of GSA's Innovation Portfolio. Membership is limited to federal government employees.

The work of the CoP will not relate to or support any specific RPA contract actions of any agency. However, the CoP may support agency RPA contracting generically, e.g., standard statements of work for particular kinds of RPA activity.

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CoP will be to review this charter, modify as agreed, and approve, with amendments made thereafter as agreed.

The CoP will provide updates as needed to the Chief Executive Officer Councils on issues pertaining to their area.

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The CoP Chairs will determine the number of Practice Areas and work with CoP members to set up practice teams. The initial Practice Areas, subject to change by the CoP, are as follows. Note that the Practice Areas are grouped, and each within the group heading is a separate Practice Area.

Program and Operations Management

- Governance / Center of Excellence (including strategies for scaling)
- Human Resource Impacts, Culture Change, Communications (internal and external)
- Business Case (including benefit realization)
- Operations Management (scheduling, capacity management, license management, modify and fix bots)
- Management Reporting (performance metrics, dashboarding)
- Contracting

Process Assessment and Implementation

- Identification, Assessment and Selection of Processes for Automation
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- Development (approach and process, e.g., business, IT and/or contract developers, training)
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- Bot Scope (guidelines for human vs. bot functions, privacy, ethics)

Technical

- IT Platform, including configuration and capacity management (options and best practice)
- Bot Credentialing (options and best practices)
- Security(ATO)
- Development (e.g., best practice, code reviews)
- Privacy [Privacy Threshold Assessment (PTA), Privacy Impact Assessments (PIA), System of Records Notices (SORN)]
- Software Options and Capabilities
- Platform for Government-wide Sharing of Bots and Bot Components ('Asset Library')

- Evolution / Combination of RPA with Cognitive Technologies

Each CoP meeting agenda will include a review of at least one of these Practice Areas.

III. RPA Implementation & Operations Guide

The work product of the Practice Area Teams will be compiled into a Federal Government RPA Implementation and Operations Guide. The Guide will be refreshed on a regular basis to maintain up-to-date information and add new content. The Guide will not constitute policy but will provide guidance for agencies intended to accelerate RPA adoption by providing options and recommendations for standards and best practices. Assembly of the Guide and version control will be managed by the Chair and Co-Chairs.

Although the CoP will facilitate a number of activities and events, e.g., guest speakers and RPA Days, the Guide will remain the heart of the CoP, serving as it's primary tool for accelerating adoption and use of RPA in the federal government.

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The GSA RPA Program Team is very excited about the CoP and looks forward to working with you to make it a success!

Best Regards, Ed

Ed Burrows
Robotic Process Automation Program Manager
GSA-USDA Financial Management Liaison
Office of the Chief Financial Officer (BG)
General Services Administration
1800 F St. NW, Room 6223
Washington, D.C. 20405
Cell: (b) (6) ███████

In God we trust; all others bring data.   🙂

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Greetings Federal RPA Community of Practice Members,

The CoP is off to a great start, with 467 members.   Many have joined who were not on our original distribution, so thank you for spreading the word! Any of your colleagues who have not received this email and wish to join can do so by writing to fedrpa-subscribe-request@listserv.gsa.gov.

Initial Members Survey and Practice Area Volunteering
If you have not yet completed the survey, please access it through the link below. You will be able to identify the practice area teams you would like to join or lead.

https://feedback.gsa.gov/jfe/form/SV_0xocvXI9MTQgMHX

We have had a number of volunteers already to lead practice areas. If you volunteered to join a team, you may be contacted by your leader soon to begin meetings. The goal of the teams is to identify technical and procedural options, best practices, tools and templates for use across the federal government. Please keep in mind as you volunteer for teams that they are working groups, not just informational.   Many of us who are implementing RPA solutions or planning to do so need to master all practice areas. However, given the number of CoP members, we can 'divide and conquer,' so you can limit your participation to areas to which you can actively contribute. At our meetings we will have read outs from the team leaders so we all can learn about all areas, and in time benefit from a Federal RPA Implementation & Operations Guide.

We had an important development for the Credentialing team last week, with the issuance of an OMB memo on identify, credential and access management (ICAM). See the link to the memo below. Section IV, Architecture, para. 3 refers to RPA. Jennifer Hill of Treasury FIT will lead the Credentialing Practice Area for the CoP.

https://www.whitehouse.gov/wp-content/uploads/2019/05/M-19-17.pdf

GSA Affiliated Customer Account (GACA) for GSA Google Suite Access
Our welcome letter provided instructions for setting up this type of GSA-authorized Gmail account. Many of you have successfully done this, but some of your agencies do not permit use of Gmail even for a GSA-authorized account. We will therefore use, in addition to GSA Google Suite collaboration for those who can access it, another option, possibly OMB Max. Although this will not allow teams to collaborate on documents in real time, it will allow document sharing.

For those who have not yet attempted to set up a GACA account, here are the instructions:

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> · Enter your first name and last name
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> · Write to rpa@gsa.gov from their new GACA account informing us that the account has been set up

Upcoming Meetings
We will have our first full membership meeting on Friday, June 21st from 10 to 12 at GSA HQ at 1800 F St. NW. You will receive an invitation shortly. In your response please let us know if you will attend in person or via web conference. We will review the CoP charter, the team leaders will discuss their areas, and we will plan

next steps. We will also have a guest speaker if possible. Prior to the full membership meeting we will have a planning meeting among the practice area leaders.

We are very excited at GSA about the CoP and appreciate your enthusiastic response. As a group we have the opportunity to make a very large improvement in the efficiency and effectiveness of the federal government. The capability, methods and business case are proven and it is our job to execute!

Best Regards, Ed

Ed Burrows
Chair, Federal RPA CoP
Office of the Chief Financial Officer
General Services Administration
1800 F St. NW, Room 6223
Washington, D.C. 20405
Cell: (b) (6)

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Do you have an alternate way for us to join if we cannot access your site? My user name will be (if this formatting is acceptable) = GSA_AmandaKnopp
Please let me know what else you require to join.

Many thanks ~

Amanda M. Knopp
Digital Workforce Support Team
Robotic Process Automation Analyst
Service Desk Branch
Operations Support Division
Bureau of the Fiscal Service
Phone: (304) 480-8737

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Ed Burrows - BG
Sent: Wednesday, May 8, 2019 9:49 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [FEDRPA] Welcome to the Federal RPA Community of Practice!

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Same here.

Best,
Karin Dasuki

Karin Dasuki
Deputy Director, Office of Finance and Accounting
Office of Finance and Accounting
Department of Energy
Ph: 301-903-1708

From: Federal Robotic Process Automation [mailto:FEDRPA@LISTSERV.GSA.GOV] **On Behalf Of** Amanda M. Knopp
Sent: Thursday, June 06, 2019 8:01 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [EXTERNAL] [FEDRPA] REQUEST TO JOIN -- Federal RPA Community of Practice

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Please let me know what else you require to join.

Many thanks ~

Amanda M. Knopp
Digital Workforce Support Team
Robotic Process Automation Analyst
Service Desk Branch
Operations Support Division
Bureau of the Fiscal Service
Phone: (304) 480-8737

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May I suggest Max.gov?

Donald Bauer
Chief, Systems Development Division
HR/EX/SDD
bauerde@state.gov

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> on behalf of Amanda M. Knopp <Amanda.Knopp@FISCAL.TREASURY.GOV>
Sent: Thursday, June 6, 2019 8:01:02 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [FEDRPA] REQUEST TO JOIN -- Federal RPA Community of Practice

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Many thanks ~

Amanda M. Knopp
Digital Workforce Support Team
Robotic Process Automation Analyst
Service Desk Branch
Operations Support Division
Bureau of the Fiscal Service
Phone: (304) 480-8737

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Ed Burrows - BG
Sent: Wednesday, May 8, 2019 9:49 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [FEDRPA] Welcome to the Federal RPA Community of Practice!

Federal Robotic Process Automation Community of Practice
Welcome Letter

May 8, 2019

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·   Governance / Center of Excellence (including strategies for scaling)

·   Human Resource Impacts, Culture Change, Communications (internal and external)

·   Business Case (including benefit realization)

·   Operations Management (scheduling, capacity management, license management, modify and fix bots)

·   Management Reporting (performance metrics, dashboarding)

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GSA-USDA Financial Management Liaison
Office of the Chief Financial Officer (BG)

General Services Administration
1800 F St. NW, Room 6223
Washington, D.C. 20405
Cell: (b) (6) ███████

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Steve Moore
Senior Technologist
Office of Financial Management Systems
United States Patent and Trademark Office
(O) 571-272-5355 | (M) 703-625-1683
steve.moore@uspto.gov

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Al Taylor

HealthIT.gov ⭐   **Albert W Taylor II, MD I Medical Informatics Officer I Office of Technology I Office of the National Coordinator for Health IT**
330 C Street SW I Washington, DC I 20201 IEmail: albert.taylor@hhs.gov I Phone: 202-260-0675 I Mobile: **(b) (6)**

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Sent: Thursday, June 06, 2019 11:36 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: Re: [FEDRPA] REQUEST TO JOIN -- Federal RPA Community of Practice

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Donald Bauer
Chief, Systems Development Division
HR/EX/SDD
bauerde@state.gov

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Many thanks ~

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Service Desk Branch
Operations Support Division
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Phone: (304) 480-8737

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Federal Robotic Process Automation Community of Practice

Welcome Letter

May 8, 2019

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Federal Robotic Process Automation Community of Practice

Draft Charter

May 8, 2019

I.Purpose

The purpose of the federal Robotic Process Automation (RPA) Community of Practice (CoP) is to accelerate the use of RPA across the federal government in order to benefit from cost-effectively automating manual, repetitive, and rule-based operations. The benefits include:

1. Advancing agency missions and improving employee satisfaction, retention and recruitment by shifting from low-value to high-value work (supports President's Management Agenda, Cross-Agency Priority Goal 6);

2. Increasing the efficiency of existing operations and achieving more than can be done with current resources, e.g., more frequent and timely processing, improved data quality through full reconciliation and cleanse, streamlining procurements and licensing;

3. Reducing costs over time by creating capacity to maintain quality of service and absorb new work requirements without new hiring or replacement of retirees;

4. Reducing processing errors and consequent costs of rework, delay and customer dissatisfaction;

5. Reducing process cycle times and thereby improving service to internal customers and citizens;

6. Improving internal controls, regulatory compliance and auditability;

7. Improving security and privacy by automating and securing handling of sensitive data and reducing vulnerability to harmful action; and

8. Complementing IT architecture by automating data entry and other manual processing that occurs around and between core systems.

These benefits cut across all functional areas in government, including financial operations, acquisition, human resources, citizen services, IT operations, etc. The CoP will achieve these ends through information sharing and identification and definition of options, best practices, methods and standards for RPA implementation and operations. The CoP will not set policy, but policy-setting agencies are encouraged to participate and make use of the community's base of knowledge, information and experience.

II.   Structure

The Executive Sponsors of the CoP are the GSA Chief Financial Officer and Technology Transformation Service (TTS) Director.   The CoP will be chaired by the GSA RPA Program Manager. The Chair will recommend Co-Chairs from agencies, who will also be approved by the GSA CFO and TTS Director.

The Chair and Co-Chairs will facilitate meetings and manage membership and information through the infrastructure of GSA's Innovation Portfolio. Membership is limited to federal government employees.

The work of the CoP will not relate to or support any specific RPA contract actions of any agency. However, the CoP may support agency RPA contracting generically, e.g., standard statements of work for particular kinds of RPA activity.

Meetings will be held monthly at GSA's headquarters building at 1800 F St., NW, Washington, D.C. or at volunteering host agencies, with web conferencing available for remote attendees. The first official action of the CoP will be to review this charter, modify as agreed, and approve, with amendments made thereafter as agreed.

The CoP will provide updates as needed to the Chief Executive Officer Councils on issues pertaining to their area.

The CoP will be organized by Practice Areas for distinct components of RPA program management. Each Practice Area will be led by a volunteer agency employee - a Practice Leader - and supported by a Practice Area Team - a group of agency volunteers. This CoP is a working group and all members will be required to join at least one Practice Area Team after the first meeting attended.

The CoP Chairs will determine the number of Practice Areas and work with CoP members to set up practice teams. The initial Practice Areas, subject to change by the CoP, are as follows. Note that the Practice Areas

are grouped, and each within the group heading is a separate Practice Area.

Program and Operations Management

- · Governance / Center of Excellence (including strategies for scaling)

- · Human Resource Impacts, Culture Change, Communications (internal and external)

- · Business Case (including benefit realization)

- · Operations Management (scheduling, capacity management, license management, modify and fix bots)

- · Management Reporting (performance metrics, dashboarding)

- · Contracting

Process Assessment and Implementation

- · Identification, Assessment and Selection of Processes for Automation

- · Implementation Process (including documentation, templates, and audit readiness)

- · Development (approach and process, e.g., business, IT and/or contract developers, training)

- · Use Cases, including potential government-wide cases and identification of bots and bot components to be included in the 'Asset LIbrary' (reusable code)

- · Bot Scope (guidelines for human vs. bot functions, privacy, ethics)

Technical

- · IT Platform, including configuration and capacity management (options and best practice)

- · Bot Credentialing (options and best practices)

- · Security(ATO)

- · Development (e.g., best practice, code reviews)

- · Privacy [Privacy Threshold Assessment (PTA), Privacy Impact Assessments (PIA), System of Records Notices (SORN)]

- · Software Options and Capabilities

- · Platform for Government-wide Sharing of Bots and Bot Components ('Asset Library')

- · Evolution / Combination of RPA with Cognitive Technologies

Each CoP meeting agenda will include a review of at least one of these Practice Areas.

III.   RPA Implementation & Operations Guide

The work product of the Practice Area Teams will be compiled into a Federal Government RPA Implementation and Operations Guide. The Guide will be refreshed on a regular basis to maintain up-to-date information and add new content. The Guide will not constitute policy but will provide guidance for agencies intended to accelerate RPA adoption by providing options and recommendations for standards and best practices. Assembly of the Guide and version control will be managed by the Chair and Co-Chairs.

Although the CoP will facilitate a number of activities and events, e.g., guest speakers and RPA Days, the Guide will remain the heart of the CoP, serving as it's primary tool for accelerating adoption and use of RPA in

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The GSA RPA Program Team is very excited about the CoP and looks forward to working with you to make it a success!

Best Regards, Ed

Ed Burrows
Robotic Process Automation Program Manager
GSA-USDA Financial Management Liaison
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Good Afternoon,

After reading this chain and seeing that there are some collaboration issues and we are in need of a solution..
I may have it.. is it possible to set up a time to discuss this and get some further requirements? If so I maybe
able to assist...

Smile!!

R,

TRACIE D. STRACK, SA
Product Manager
Tracie.Strack@gsa.gov
202-262-8743

Office of Systems Management (OSM)
Federal Acquisition Service (FAS)
General Services Administration (GSA)
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- ·　Enter your first name and last name

- ·　Enter username: must start with "GSA."

- ·　Then first name, last name - example: GSA.johnsmith@gmail.com (mandatory)

- ·　Complete all required fields, accept the Terms of Service and submit the request

- ·　Set up 2-Step Verification (also known as two-factor authentication) using a smartphone that can receive simple messages (mandatory)

- ·　Write to rpa@gsa.gov from their new GACA account informing us that the account has been set up

Federal government employees who have not received this welcome letter may write to fedrpa-subscribe-request@listserv.gsa.gov to join the CoP.　The content of the email does not matter.

Please also visit our CoP homepage here on digital.gov.

Her is the draft charter for the CoP. We will review and approve it at the first meeting. It will also be available in the CoP Google folder. Once we receive your GACA email account, we will provide you access to the folder and you may add comments or suggest edits to the charter prior to the first meeting.

****

Federal Robotic Process Automation Community of Practice

Draft Charter

May 8, 2019

I.Purpose

The purpose of the federal Robotic Process Automation (RPA) Community of Practice (CoP) is to accelerate the use of RPA across the federal government in order to benefit from cost-effectively

automating manual, repetitive, and rule-based operations. The benefits include:

1. Advancing agency missions and improving employee satisfaction, retention and recruitment by shifting from low-value to high-value work (supports President's Management Agenda, Cross-Agency Priority Goal 6);

2. Increasing the efficiency of existing operations and achieving more than can be done with current resources, e.g., more frequent and timely processing, improved data quality through full reconciliation and cleanse, streamlining procurements and licensing;

3. Reducing costs over time by creating capacity to maintain quality of service and absorb new work requirements without new hiring or replacement of retirees;

4. Reducing processing errors and consequent costs of rework, delay and customer dissatisfaction;

5. Reducing process cycle times and thereby improving service to internal customers and citizens;

6. Improving internal controls, regulatory compliance and auditability;

7. Improving security and privacy by automating and securing handling of sensitive data and reducing vulnerability to harmful action; and

8. Complementing IT architecture by automating data entry and other manual processing that occurs around and between core systems.

These benefits cut across all functional areas in government, including financial operations, acquisition, human resources, citizen services, IT operations, etc. The CoP will achieve these ends through information sharing and identification and definition of options, best practices, methods and standards for RPA implementation and operations. The CoP will not set policy, but policy-setting agencies are encouraged to participate and make use of the community's base of knowledge, information and experience.

II.   Structure

The Executive Sponsors of the CoP are the GSA Chief Financial Officer and Technology Transformation Service (TTS) Director.   The CoP will be chaired by the GSA RPA Program Manager. The Chair will recommend Co-Chairs from agencies, who will also be approved by the GSA CFO and TTS Director.

The Chair and Co-Chairs will facilitate meetings and manage membership and information through the infrastructure of GSA's Innovation Portfolio. Membership is limited to federal government employees.

The work of the CoP will not relate to or support any specific RPA contract actions of any agency. However, the CoP may support agency RPA contracting generically, e.g., standard statements of work for particular kinds of RPA activity.

Meetings will be held monthly at GSA's headquarters building at 1800 F St., NW, Washington, D.C. or at volunteering host agencies, with web conferencing available for remote attendees. The first official action of the CoP will be to review this charter, modify as agreed, and approve, with amendments made thereafter as agreed.

The CoP will provide updates as needed to the Chief Executive Officer Councils on issues pertaining to their area.

The CoP will be organized by Practice Areas for distinct components of RPA program management. Each Practice Area will be led by a volunteer agency employee - a Practice Leader - and supported by a Practice Area Team - a group of agency volunteers. This CoP is a working group and all members will be required to join at least one Practice Area Team after the first meeting attended.

The CoP Chairs will determine the number of Practice Areas and work with CoP members to set up practice teams. The initial Practice Areas, subject to change by the CoP, are as follows. Note that the

Practice Areas are grouped, and each within the group heading is a separate Practice Area.

Program and Operations Management

·   Governance / Center of Excellence (including strategies for scaling)

·   Human Resource Impacts, Culture Change, Communications (internal and external)

·   Business Case (including benefit realization)

·   Operations Management (scheduling, capacity management, license management, modify and fix bots)

·   Management Reporting (performance metrics, dashboarding)

·   Contracting

Process Assessment and Implementation

·   Identification, Assessment and Selection of Processes for Automation

·   Implementation Process (including documentation, templates, and audit readiness)

·   Development (approach and process, e.g., business, IT and/or contract developers, training)

·   Use Cases, including potential government-wide cases and identification of bots and bot components to be included in the 'Asset LIbrary' (reusable code)

·   Bot Scope (guidelines for human vs. bot functions, privacy, ethics)

Technical

·   IT Platform, including configuration and capacity management (options and best practice)

·   Bot Credentialing (options and best practices)

·   Security(ATO)

·   Development (e.g., best practice, code reviews)

·   Privacy [Privacy Threshold Assessment (PTA), Privacy Impact Assessments (PIA), System of Records Notices (SORN)]

·   Software Options and Capabilities

·   Platform for Government-wide Sharing of Bots and Bot Components ('Asset Library')

·   Evolution / Combination of RPA with Cognitive Technologies

Each CoP meeting agenda will include a review of at least one of these Practice Areas.

III.   RPA Implementation & Operations Guide

The work product of the Practice Area Teams will be compiled into a Federal Government RPA Implementation and Operations Guide. The Guide will be refreshed on a regular basis to maintain up-to-date information and add new content. The Guide will not constitute policy but will provide guidance for agencies intended to accelerate RPA adoption by providing options and recommendations for standards and best practices. Assembly of the Guide and version control will be managed by the Chair and Co-Chairs.

Although the CoP will facilitate a number of activities and events, e.g., guest speakers and RPA Days, the Guide will remain the heart of the CoP, serving as it's primary tool for accelerating adoption and use of RPA in the federal government.

****

The GSA RPA Program Team is very excited about the CoP and looks forward to working with you to make it a success!

Best Regards, Ed

Ed Burrows

Robotic Process Automation Program Manager

GSA-USDA Financial Management Liaison

Office of the Chief Financial Officer (BG)

General Services Administration

1800 F St. NW, Room 6223

Washington, D.C. 20405

Cell: (b) (6) ███████

In God we trust; all others bring data. 🙂

🖨 **Print**

Fed RPA CoP Members,

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Join Zoom Meeting
(b) (6)

Thank you.

Ed

Ed Burrows
Robotic Process Automation Program Manager
Office of the Chief Financial Officer (BG)
General Services Administration
1800 F St. NW, Room 6223
Washington, D.C. 20405
Cell: (b) (6)

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🖨 **Print**

Please advise -

Amanda M. Knopp
Digital Workforce Support Team
Service Desk Branch
Operations Support Division
Bureau of the Fiscal Service
Phone: (304) 480-8737

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Ed Burrows - BG
Sent: Wednesday, June 19, 2019 7:57 PM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [FEDRPA] Important Information for the Federal RPA CoP Kickoff Meeting on Friday 6-21

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Suggestion, no matter what you use please send out the Slide deck prior.

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Thanks,

~ John

John Lockwood
RPA Program Manager

Cell: **(b) (6)** (preferred)
Ogden UT – Mountain Time Zone = 2 hours earlier than Eastern Time

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Sent: Friday, June 21, 2019 8:35 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [Non-DoD Source] [FEDRPA] Can't access: Federal RPA CoP Kickoff Meeting on Friday 6-21

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Ed

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Robotic Process Automation Program Manager
Office of the Chief Financial Officer (BG)
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🖨 **Print**

Hi John,

We understand some people may not be able to join Zoom (due to agency restrictions). The phone line will allow users to listen in, though:

We have muted most attendees to reduce audio issues. Please send your question via the Zoom chat or send directly to me at lauren.rabb@gsa.gov. We will be distributing the slides after the meeting.

Thanks,
Lauren

On Fri, Jun 21, 2019 at 11:40 AM Lockwood, John L CIV DLA INFO OPERATIONS (USA) <000004fdc74075c8-dmarc-request@listserv.gsa.gov> wrote:

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RPA Program Manager

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Ed

Ed Burrows

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Office of the Chief Financial Officer (BG)

General Services Administration

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Washington, D.C. 20405

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--
Lauren Rabb
DigitalGov University (DGU) Support
DigitalGov
U.S. General Services Administration (GSA)
Technology Transformation Service (TTS)
Office of Products & Programs
lauren.rabb@gsa.gov
703-282-5363

DIGITALGOV

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🖨 **Print**

Ed,

I am in Denver doing training today so will not join, but I am still interested.

John Broderick
MLRS Product Management Team, Data
202-912-7313 (office)
(b) (6) ███████████ (cell)

On Wed, Jun 19, 2019 at 5:59 PM Ed Burrows - BG <edward.burrows@gsa.gov> wrote:

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(b) (6)
███████████████████████████████

(b) (6)

Thank you.

Ed

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General Services Administration
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Good afternoon Ed,
It was a pleasure meeting you this morning, and thank you for the great CoP meeting. It was very informative and it will provide an environment where the Federal Government can discuss the issues openly.

This is a follow-up to our conversation after the meeting when you mentioned you could send me the check list of items to start RPA.

I look forward to receiving the power point presentation from the meeting today, as well as the check list and any other ideas that you may have that will guide me in a right direction.

Thank you

V/R

(b) (7)(C)

"What you do has far greater impact than what you say" —*Stephen Covey*

With honor and integrity, we will safeguard the American people, our homeland, and our values.

Confidentiality Notice: This e-mail message, including any attachments, is intended only for the person(s) or entity(ies) to which it is addressed and contains information that may be confidential, legally protected, privacy relevant, proprietary in nature or otherwise protected by law from disclosure. If you received this message in error, you are hereby notified that reading, sharing, copying or distributing this message, or its contents, is prohibited. Please telephone or reply to me immediately and delete all copies of the message.

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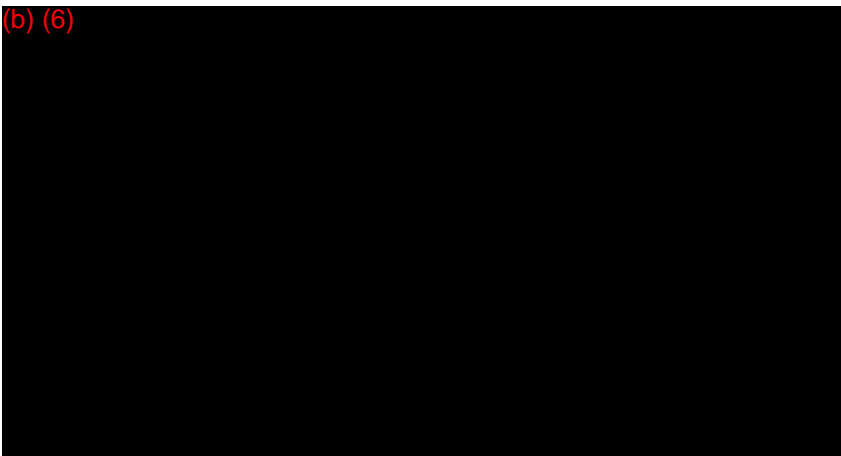https://feedback.gsa.gov/jfe/form/SV_0xocvXI9MTQgMHX

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Thank you for attending the Federal RPA CoP Kickoff! Special thanks to those who gave agency updates, our practice area leaders and those who participated with questions and comments. I apologize for the difficulties some experienced accessing the web conference. We are looking into whether another conferencing service is needed. If you know that your agency has a permitted list of services, please let us know.

I am happy to report that two people volunteered to be practice area co-leaders after the meeting. Adrienne Barge, IT Specialist at DHS for the Development area, and Frank Greenwell, Senior Information Security Specialist of the Board of Governors of the Federal Reserve System for Security/ATO. Also, Harrison Smith, Senior Procurement Executive (Acting) at Treasury, volunteered to organize an RPA industry day. Thank you Adrienne, Frank and Harrison! We are very grateful for the initiative that all of our volunteers have taken on top of your job responsibilities to drive this important community forward.

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Please find attached the presentation used in the meeting.

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You may send questions and comments to rpa@gsa.gov.   You may write to this listserv - FEDRPA@listserv.gs.gov - if you have questions or comments that you wish to share with the entire community.

If you have not already taken the survey, please access it through this link::https://feedback.gsa.gov/jfe/form/SV_0xocvXI9MTQgMHX

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We are continuing to explore collaboration platforms. If your agency does not prevent access to Gmail, you may access GSA's Google Suite. many of you have already created accounts. You will be able to collaborate real time with your teams even though we will identify a platform that all agencies can access. Here are the instructions for creating a GSA Affiliated Customer Account (GACA):

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·   Enter your first name and last name

·   Enter username: must start with "GSA."

·   Then first name, last name - example: GSA.johnsmith@gmail.com (mandatory)

·   Complete all required fields, accept the Terms of Service and submit the request

·   Set up 2-Step Verification (also known as two-factor authentication) using a smartphone that can receive simple messages (mandatory)

·   Write to rpa@gsa.gov from their new GACA account informing us that the account has been set up

Best regards and thank you again for a successful kickoff.

Ed

Ed Burrows
Robotic Process Automation Program Manager
Office of the Chief Financial Officer (BG)
General Services Administration
1800 F St. NW, Room 6223
Washington, D.C. 20405
Cell: (b) (6) ███████

The difference between try and triumph is just a little *umph*

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🖨 **Print**

Ed,

Didn't catch you on Friday, but wanted to tell you you did a great job on the kick-off meeting.

Don

GSA

Don Crawford | Senior Program Manager, CCIM, FAC-PPM III, FAC-COR III
Center for Lease Acquisition Career Management and Compliance (PRBA)
Public Buildings Service | Office of Leasing
o: 602.514.7288 | c: (b) (6) ████████ | donald.crawford@gsa.gov
www.gsa.gov   🔵 🔵 🔵 🔵

LAO | **LCP** | **Warrant** | **Training** | **SME2U** | **LVT** | **Leasing Council** | **PMR** | **Audit** | **Insite** | **Feedback**

On Mon, Jun 24, 2019 at 8:04 AM Ed Burrows - BG <edward.burrows@gsa.gov> wrote:

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Office of the Chief Financial Officer (BG)
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🖨 **Print**

Good Afternoon Ed,

I took the survey today and signed up for the practice areas I am interested in. After thought, if no one has volunteered, I would like to co-lead the Governance / Center of Excellence.

(b) (7)(C)

Strategic Technology Management (STM)
Office of Chief Technology Officer (OCTO)
Department of Homeland Security **|** Office of the Chief Information Officer (OCIO)
(b) hq.dhs.gov **(e)**

DHS Vision: *With honor and integrity, we will safeguard the American people, our homeland, and our values.*

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Ed Burrows - BG
Sent: Monday, June 24, 2019 9:53 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [FEDRPA] Federal RPA CoP Kickoff followup

Thank you for attending the Federal RPA CoP Kickoff! Special thanks to those who gave agency updates, our practice area leaders and those who participated with questions and comments. I apologize for the difficulties some experienced accessing the web conference. We are looking into whether another conferencing service is needed. If you know that your agency has a permitted list of services, please let us know.

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Also, I wanted to help keep some of the momentum going by sharing an article I received today. It's an article about the RPA Market Space. It basically states that RPA is the fastest growing technology in the enterprise Software Marketplace. It also provides some comparative market share statistics. I thought this information was very insight full and could possibly assist/contribute to the selection process or help validate a selection.

Please review and "reply all" with your thoughts or comments to this article. Or please share your insightful information or articles with this listserv.

Article:
https://techcrunch.com/2019/06/24/gartner-finds-rpa-is-fastest-growing-market-in-enterprise-software/
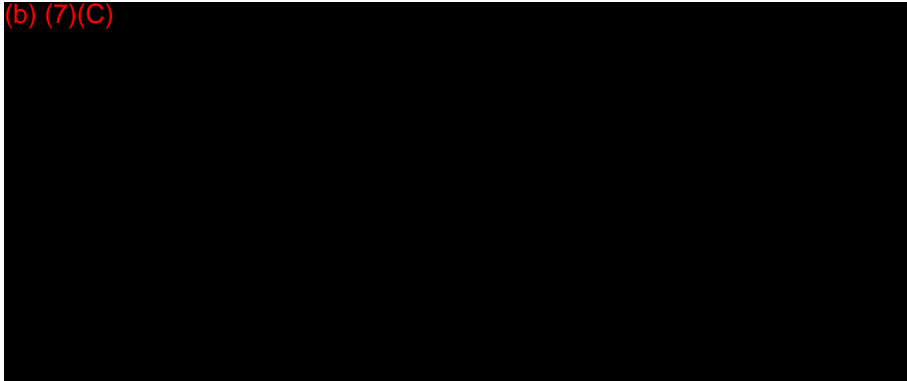
Thank you for your time and attention,

Best,

(b) (7)(C)

Office of Financial Management
U.S. Immigration and Customs Enforcement
1201 Maryland Avenue SW
Washington, DC 20536-5707
Office: (202) 732-4820 **Cell:** (b) (6)
(b) (7)(C)   ce.dhs.gov

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Good Morning RPA CoP,
I'd like to be a deputy practice leader for one of the following areas: Human Resource @OPM, area led by ICE person, or Credentialing. I didn't jot down names during the call. Can someone please send me the names/contact for these practice area leads so I can reach out to them and determine which area I am the best fit for? Thanks a lot!

(b) (7)(C)

Telework: Mon & Tues
Office: Wed, Thurs, & Fri

Your Purpose is Greater Than Your Challenges!!

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From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Gregory, James
Sent: Tuesday, June 25, 2019 9:48 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [FEDRPA] An informative article about the RPA market

Greetings fellow CoP members!!

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Article:
https://techcrunch.com/2019/06/24/gartner-finds-rpa-is-fastest-growing-market-in-enterprise-software/

Thank you for your time and attention,

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Good Afternoon CoP Members!!

Great Job!! Congratulations on the positive feedback and kick-off of RPA! Echo, echo, echo....

I unfortunately had a schedule conflict and let Ed know but was unable to attend this meeting.
I plan to review the meeting and material if it is available.

What are the open positions still needed or was I already assigned?
I am here to serve!

Smile!!

R,

TRACIE D. STRACK, SA, POPM
Product Owner/Manager
Tracie.Strack@gsa.gov
202-262-8743

Office of Systems Management (OSM)
Federal Acquisition Service (FAS)
General Services Administration (GSA)
1800 F Street, NW
Washington, DC 20405

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On Wed, Jun 26, 2019 at 11:50 AM (b) (7)(C)   <000004c809b9fdd8-dmarc-request@listserv.gsa.gov> wrote:

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> Kind Regards, LL
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> (b) (7)(C)

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Telework: Mon & Tues

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Good Afternoon RPA Community!

Does your RPA team work on a product or service in government that has an effect on the public? Have you ever had an idea for how to transform a product or service to make the government better and more efficient? Then come and join the 10x team for an online event!

10x is a new investment fund for technology products in the government from the Technology Transformation Services (TTS) office at the U.S. General Services Administration (GSA) that funds new ideas to help the government deliver better products and services. The next deadline for submitting an idea to 10x is July 30, 2019.

Online Event Information: An Introduction to 10x and How to Get Your Idea Funded. Wednesday, July 17, 2019 | 2:00 PM – 3:00 PM ET.

Register here: https://go.usa.gov/xynHC

The 10x team will walk you through the process of submitting an idea, and will review the four key phases that your project could progress through — investigation, discovery, development, and scale, and answer any questions you may have.

Read more about it: https://digital.gov/2019/07/09/get-to-know-10x/

Have questions about 10x? Feel free to send them an email 10x@gsa.gov

--
Alexander Schulte
DigitalGov University (DGU) Support
DigitalGov
U.S. General Services Administration (GSA)
Technology Transformation Service (TTS)
Office of Products & Programs
alexander.schulte@gsa.gov
202-340-2689

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RPA Community,

Please see an opportunity from Challenge.gov here: https://www.challenge.gov/challenge/artificial-intelligence-applications-to-autonomous-cybersecurity-challenge/

Short description:

The Naval Information Warfare Systems Command (NAVWARSYSCOM) and the Program Executive Office for Command, Control, Communications, Computers, and Intelligence (PEO C4I) are conducting the Artificial Intelligence Applications to Autonomous Cybersecurity (AI ATAC), pronounced "AI attack" Challenge (hereinafter referred to as "the Challenge"). The Navy's Information Assurance and Cybersecurity Program Office (PMW 130) seeks to automate the Security Operations Center (SOC) using artificial intelligence and machine learning (AI/ML) beginning with the endpoint. Modern malware strains, especially sophisticated malware created by advanced persistent threat (APT) groups, have shown capabilities that mutate faster than signature-based protection tools can adapt. PMW 130 solicits white papers describing endpoint-based security technologies and the corresponding tool for evaluation in the AI ATAC Prize Challenge competition.

--
Alexander Schulte
DigitalGov University (DGU) Support
DigitalGov
U.S. General Services Administration (GSA)
Technology Transformation Service (TTS)
Office of Products & Programs
alexander.schulte@gsa.gov
202-340-2689

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Dear RPA Community,

Register here to learn about the eight year journey of integrating machine learning models into the Bureau of Labor Statistics (BLS). Discover how the organization learned to change, and how the team worked internally to make BLS more data-friendly.

Joining us will be presenter Alex Measure, Economist at Bureau of Labor Statistics. Alex is an economist turned machine learning and natural language processing practitioner. He designs, builds, and maintains machine learning systems that automate difficult text classification, information extraction, and record matching problems in production systems.

Registration: https://go.usa.gov/xyEYQ

--
Alexander Schulte
DigitalGov University (DGU) Support
DigitalGov
U.S. General Services Administration (GSA)
Technology Transformation Service (TTS)
Office of Products & Programs
alexander.schulte@gsa.gov
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Hello Everyone,

My name is Anju Anand and I am co-chairing the FED RPA CoP Practice Area 1 – Governance and CoE with (b) (7)(C) and Pamela Wolfe. We are chartered with creating a playbook for this practice area to enable other agencies with a starting point and options for them to consider. As I understand that you all are at a different stages of your RPA journey. I am requesting that the Agencies, who have a documented Governance and CoE processes, to send us a copy of their documents which will enable us to create such draft playbook.

Thanks in advance for your support.

Please let me know if you have any questions.

Anju Anand
IT Program Manager
Office of Information and Resource Management/Division of Information Systems
National Science Foundation
aanand@nsf.gov
(w) 703-292-4295

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Hello Federal RPA CoP Members!

I am pleased to invite you to the next community-wide meeting to be held at GSA Headquarters on Friday 8/23 from 10:00 AM EST - 12:00 PM EST in room 1425 and virtually through our Zoom platform. For members who cannot access Zoom, we welcome you to dial in and follow along with the slide deck that will be provided prior to the event. This meeting will be for all CoP members and other Federal employees who are interested in joining the community.

Since the initial kick-off meeting, the CoP practice area leaders have been working diligently to identify and meet with team members, scope their area and outline their content for the RPA Playbook to be published in October. The outlines for all areas include principles, objectives, options, evaluation criteria and identification of best practices where possible. We will distribute the outlines prior to the meeting to receive your comments. This will be a very substantive discussion of all aspects of implementing and operating RPA that you do not want to miss!

To register please follow the link below:
https://www.eventbrite.com/e/robotic-process-automation-community-of-practice-meeting-registration-66892438083

Best Regards, Ed

Ed Burrows
Robotic Process Automation Program Manager
Office of the Chief Financial Officer (BG)
General Services Administration
1800 F St. NW, Room 6223
Washington, D.C. 20405
Cell: (b) (6) ████████

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Hello Federal RPA CoP Members,

Potomac Forum has openings on a government panel from 1:00 to 2:15 at its Thursday, August 22nd Training Workshop *Robotic Process Automation (RPA), Intelligent Automation (IA) and Artificial Intelligence (AI) in Government Workshop II* at the Willard InterContinental Hotel, Washington, D.C. Potomac Forum has a long history of providing training to government employees. This is their 2nd training workshop on this topic. The government students rated the first workshop as excellent. I spoke at the first training and will also speak at this one. It is classroom setting, and compared to typical government-industry events, the panelists can speak more in-depth and the audience is actively engaged. It is a great opportunity to share your experiences with government employees who are eager to learn about RPA and initiate programs at their agencies.

The training is 99% government attendees and no Press is permitted. The government panel members will give a 7 to 10 minute overview of the *proposed or current implementation* of RPA or AI in their agency, discuss lessons learned in obtaining justification/approval for their implementation and answer questions from the moderator and students. The panel members are invited to attend the full day workshop, including lunch..

Please let (b) (6) ███████████████████████ (copied on this email) know if you would be available to join the panel.

Thanks, Ed

Ed Burrows
Robotic Process Automation Program Manager
Office of the Chief Financial Officer (BG)
General Services Administration
1800 F St. NW, Room 6223
Washington, D.C. 20405
Cell: (b) (6) ████████

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RPA Community Members,

I want to share with you a blog by Jennifer Hill of Treasury FIT, one of our CoP leaders. It is a great, brief overview of the state of RPA in the federal government.

https://www.fiscal.treasury.gov/fit/blog/rpa-conferences.html

Ed

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General Services Administration
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Good Morning Ed,

Please add Nathan Burley and Myron Rowles to the group to represent HUD. I have copied them on this email so that you will have their email addresses for the future. Thanks so much.

Thank You~

_____

Tracy K. Bigesby
Deputy Chief Information Security Officer
Office of IT Security
Tel: (202)402-3616
Cell: (b) (6) ▓▓▓▓▓▓▓

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Ed Burrows - BGR
Sent: Wednesday, August 07, 2019 11:12 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [FEDRPA] Interesting RPA Blog

RPA Community Members,

I want to share with you a blog by Jennifer Hill of Treasury FIT, one of our CoP leaders. It is a great, brief overview of the state of RPA in the federal government.

https://www.fiscal.treasury.gov/fit/blog/rpa-conferences.html

Ed

Ed Burrows
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Cell: (b) (6) ▓▓▓▓▓▓▓

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🖶 **Print**

Hi Ed,

Could you please add Ms. Nikki Burley (copied here) to the subject listserv?

Thank you!

V/r,
Liz

Elizabeth Chirico
Acquisition Innovation Lead
Office of the Deputy Assistant Secretary of the Army (Procurement)

W: 703-697-1923
Email: elizabeth.a.chirico.civ@mail.mil

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Ed Burrows - BGR
Sent: Wednesday, August 7, 2019 11:12 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [Non-DoD Source] [FEDRPA] Interesting RPA Blog

All active links contained in this email were disabled. Please verify the identity of the sender, and confirm the authenticity of all links contained within the message prior to copying and pasting the address to a Web browser.

RPA Community Members,

I want to share with you a blog by Jennifer Hill of Treasury FIT, one of our CoP leaders. It is a great, brief overview of the state of RPA in the federal government.

Caution-https://www.fiscal.treasury.gov/fit/blog/rpa-conferences.html < Caution-https://www.fiscal.treasury.gov/fit/blog/rpa-conferences.html >

Ed

Ed Burrows
Robotic Process Automation Program Manager
Office of the Chief Financial Officer (BG)
General Services Administration
1800 F St. NW, Room 6223
Washington, D.C. 20405
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RPA Community Members,

I have some exciting news for you. You may recall that at our RPA CoP kickoff meeting in June there was discussion about how industry could engage with the CoP. Our colleagues at IRS - Harrison Smith, Mitch Winans and Tim Shaughnessy - very generously offered to organize an RPA Industry Day. They have followed through! Veronica Villalobos and Marianne Ndeckey of OPM have also been generous in providing their auditorium and surrounding space for vendor booths. We have an outstanding full day agenda of speakers and panelists, including RPA practitioners, government executives, software vendors and service providers. You will hear about industry trends, use cases, software capabilities, best practices, intelligent automation and more.

To register for the event, follow the link below:
https://www.eventbrite.com/e/federal-robotic-process-automation-industry-day-registration-68272140811

We will send the agenda as soon as it is finalized.

The CoP is pleased to offer this event to advance our goal to accelerate achievement of the benefits of RPA across the Federal government. We hope to see you there!

Ed

Ed Burrows
Robotic Process Automation Program Manager
Chair, Federal RPA Community of Practice
Office of the Chief Financial Officer (BG)
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How do interested vendors participate?

Clint Loeser
Director, Financial Operations Service
VA Financial Services Center, Austin, Texas
(b) (6)

★FSC FINANCIAL SERVICES CENTER

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Ed Burrows - BGR
Sent: Thursday, August 08, 2019 2:24 PM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [EXTERNAL] [FEDRPA] IRS, GSA and OPM Invite You to Federal RPA Industry Day on Sept. 3rd

RPA Community Members,

I have some exciting news for you. You may recall that at our RPA CoP kickoff meeting in June there was discussion about how industry could engage with the CoP. Our colleagues at IRS - Harrison Smith, Mitch Winans and Tim Shaughnessy - very generously offered to organize an RPA Industry Day. They have followed through! Veronica Villalobos and Marianne Ndeckey of OPM have also been generous in providing their auditorium and surrounding space for vendor booths. We have an outstanding full day agenda of speakers and panelists, including RPA practitioners, government executives, software vendors and service providers. You will hear about industry trends, use cases, software capabilities, best practices, intelligent automation and more.

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Federal RPA CoP Members:

If you wish to attend the CoP meeting at GSA next Friday August 23rd and RPA Industry Day at OPM on September 3rd, please use the links below to register through Eventbrite.

August 23rd CoP Meeting Registration:
https://www.eventbrite.com/e/robotic-process-automation-community-of-practice-meeting-registration-66892438083

At this meeting the CoP leaders will discuss their plans to develop content for the Federal RPA playbook for their practice areas.

Federal RPA Industry Day Registration:
https://www.eventbrite.com/e/federal-robotic-process-automation-industry-day-registration-68272140811

This event will feature Federal executive speakers, panels of government and industry RPA leaders, and many industry informational booths. It is filling up fast!

Thank you.

Ed

Ed Burrows
Robotic Process Automation Program Manager
Chair, Federal RPA Community of Practice
Office of the Chief Financial Officer (BG)
General Services Administration
1800 F St. NW, Room 6223
Washington, D.C. 20405
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Federal RPA CoP Members,

The CoP's strategy for accelerating the benefits of RPA in the government has three drivers:

1) An **RPA Playbook** to help agencies develop RPA programs and implement in less time and cost, using best practices.
2) A capability for agencies to **share RPA use cases and, where possible, automation code** for partial or full reuse.
3) **Sharing of agency implementation and operations plans**, allowing agencies to use best practice and accelerate deployments. .

The survey sent to you last week is intended to provide the practice area leaders and teams the information needed to develop the playbook. An inventory of use cases is needed to achieve the sharing objective. The survey did not ask for use cases because this information is best collected in a template.

We have developed the attached workbook to collect use cases. Thanks to Erica Thomas and the DoD RPA Consortium for providing the workbook upon which this CoP version is based.

Note: Defense agencies should continue to provide uses case information through the DoD RPA Consortium and not use the attached workbook. (We were not able to easily remove the defense agency employees from the CoP listseve.)

Non-defense agency CoP members,

Please fill in the Data Call tab of the attached workbook, using the Instructions tab as needed. Please return a completed workbook by 12 noon ET this Thursday if possible. This will allow the use cases to be summarized and presented at the CoP meeting on the 23rd. If it is not possible to make this deadline, please submit it as soon as possible. Please submit to **nick.surkamp@gsa.gov**.   **Do Not** submit to FEDRPA@listserv.gsa.gov as this will go to the full CoP membership.

Note in particular the column in the Data Call sheet for identification of automation sharing capability (None, Partial or Full). This is critical to enable the CoP to benefit from automation sharing.

Thank you for taking the time to respond to last week's survey and this use case data call. We appreciate your efforts on top of your job responsibilities. We are committed to ensuring that the information will be helpful to all agencies in your efforts to benefit from RPA.

Best Regards, Ed

Ed Burrows
Robotic Process Automation Program Manager
Chair, Federal RPA Community of Practice
Office of the Chief Financial Officer (BG)
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Washington, D.C. 20405
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🖶 **Print**

Federal RPA CoP Members,

We are excited about our second CoP full membership meeting tomorrow at GSA HQ, 1800 F St. NW, Washington DC from 10-12 ET tomorrow the 23rd. Please find attached the meeting presentations. Several of the practice area leaders will present their team's progress so far and plans. We will also review the results so far of the members survey. Gerard Badorrek, GSA CFO, will make welcoming remarks.

If you wish to attend and have not yet registered, please use the link below to register. https://www.eventbrite.com/e/robotic-process-automation-community-of-practice-meeting-registration-66892438083

Remote Attendance Information:

(b) (6)

 In-Person Attendance Information:

Session Location: Conference room 1425 at GSA (1800 F St. NW, Washington, DC).

Security: Please bring your federal government badge. You'll need to show the guards at the front entrance and your name will also be on a security list.

Also, as a reminder Federal RPA Industry Day is on Sept. 3rd. If you wish to attend use the link below to register. This event will feature Federal executive speakers, panels of government and industry RPA leaders, and many industry informational booths. It is filling up fast!

https://www.eventbrite.com/e/federal-robotic-process-automation-industry-day-registration-68272140811

Thank you.

Ed Burrows
Robotic Process Automation Program Manager
Chair, Federal RPA Community of Practice
Office of the Chief Financial Officer (BG)
General Services Administration
1800 F St. NW, Room 6223
Washington, D.C. 20405
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🖨 **Print**

Ed,

How do I submit documents for review?

Steve

From: Federal Robotic Process Automation [mailto:FEDRPA@LISTSERV.GSA.GOV] **On Behalf Of** Ed Burrows - BGR
Sent: Monday, August 19, 2019 4:42 PM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [FEDRPA] RPA Use Case Data Call

Federal RPA CoP Members,

The CoP's strategy for accelerating the benefits of RPA in the government has three drivers:

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Thank you for taking the time to respond to last week's survey and this use case data call. We appreciate your efforts on top of your job responsibilities. We are committed to ensuring that the information will be helpful to all agencies in your efforts to benefit from RPA.

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Ed Burrows
Robotic Process Automation Program Manager

Chair, Federal RPA Community of Practice
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🖶 **Print**

Please submit your use case workbook to Nick Surkamp at nick.surkamp@gsa.gov. Thank you very much.

Ed

Ed Burrows
Robotic Process Automation Program Manager
Chair, Federal RPA Community of Practice
Office of the Chief Financial Officer (BG)
General Services Administration
1800 F St. NW, Room 6223
Washington, D.C. 20405
Cell: (b) (6) ▮▮▮▮▮▮▮▮

The difference between try and triumph is just a little *umph*

On Fri, Aug 23, 2019 at 8:38 AM Hornsby, Steven W. (CMS/OFM) <000005becffe4f07-dmarc-request@listserv.gsa.gov> wrote:

> Ed,
>
> How do I submit documents for review?
>
> Steve
>
> **From:** Federal Robotic Process Automation [mailto:FEDRPA@LISTSERV.GSA.GOV] **On Behalf Of** Ed Burrows - BGR
> **Sent:** Monday, August 19, 2019 4:42 PM
> **To:** FEDRPA@LISTSERV.GSA.GOV
> **Subject:** [FEDRPA] RPA Use Case Data Call
>
> Federal RPA CoP Members,
>
> The CoP's strategy for accelerating the benefits of RPA in the government has three drivers:
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Best Regards, Ed

Ed Burrows

Robotic Process Automation Program Manager

Chair, Federal RPA Community of Practice

Office of the Chief Financial Officer (BG)

General Services Administration

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Happy Monday, RPA CoP Members!

During Friday's community-wide meeting, Ed communicated that in order for the CoP to achieve it's goal of accelerating the adoption of RPA across thee Federal Government, we are asking that you share your agencies existing RPA documentation to the appropriate practice area leaders.

If you have specific documentation relating to a practice area, please send it to the leaders of that area. Their email addresses can be found in the attached Excel file.
If you have an all encompassing implementation guide, please send that to **nick.surkamp@gsa.gov**.

Also, if you have not, please respond to our RPA survey. These results have been invaluable for gaining a better insight into what is happening with RPA across government.

Follow this link to the Survey:
Take the Survey

Or copy and paste the URL below into your internet browser:
https://feedback.gsa.gov/jfe/form/SV_0CXkv1rbaPAkrFX?
Q_DL=bCxxOBsXg8hVLGB_0CXkv1rbaPAkrFX_CGC_6utO9NbImKcTNdz&Q_CHL=email

Another reminder that we will be hosting Industry Day for all CoP members on 9/3 at OPM. To register, please follow the link below:
https://www.eventbrite.com/e/federal-robotic-process-automation-industry-day-registration-68272140811

Please do not reply directly to this email! To respond, please reply directly to **nick.surkamp@gsa.gov** or **edward.burrows@gsa.gov**.

Regards,
Nick

Robotic Process Automation

Federal Community of Practice (CoP)

Realizing the Promise of RPA to Transform Government

Ed Burrows, RPA Program Manager, General Services Administration

Welcoming Remarks

10:00-10:05 AM

Welcoming Remarks

Anil Cheriyan

Director
Technology Transformation Services (TTS)

Anil Cheriyan

Mr. Cheriyan is the Deputy Commissioner of GSA's Federal Acquisition Service (FAS) and Director of the Technology Transformation Services (TTS). The Technology Transformation Services applies modern methodologies and technologies to improve the public's experience with government. TTS helps federal agencies build, buy and share technology to achieve their digital transformation and modernization goals.

Mr. Cheriyan was appointed as Director of TTS in January 2019. In this position, he oversees the Presidential Innovation Fellows, 18F, the Office of Products and Programs, and the IT Modernization Centers of Excellence along with offices that provide support across TTS.

Prior to joining GSA, Mr. Cheriyan was the Executive Vice President and Chief Information Officer at SunTrust Banks, where he led the transformation of the banks' digital, data, and operations. Prior to SunTrust, he led several consulting practices at IBM and PwC Management Consulting, where he drove the business and technology transformation for the firms' strategic clients.

Mr. Cheriyan earned his Master of Science and Master of Philosophy Degrees in Management as well as a Bachelor of Science in Electronic and Electrical Engineering from Imperial College in London, UK. He has been the recipient of numerous industry awards throughout his career, including IDC CIO 100, Computerworld Premier 100 Leader, and Enterprise CIO of the Year.

Agenda, Charter Review, and CoP Goals

10:05-10:15 AM

Agenda

10:00-10:05 AM – **Welcoming Remarks**: *Anil Cheriyan, Director, GSA Technology Transformation Services and Executive Co-Chair of the Federal RPA CoP*

10:05-10:15 AM – **Agenda, Charter Review, and CoP Goals**: *Ed Burrows, GSA RPA Program Manager and CoP Chair*

10:15-10:20 AM – **Practice Areas Overview**: *Ed Burrows*

10:20-10:50 AM – **Practice Area Leader Introductions:** *Ed Burrows and Leaders*

10:50-11:30 AM – **Survey Results & Agency Status Discussion**: *Facilitated by Ed Burrows*

11:30-11:35 AM – **Meeting Plan**: *Ed Burrows*

11:35-11:55 AM – **Next Steps:** *Community Building: All*

11:55-12:00 PM – **Administrative Update:** Nick Surkamp

Ed Burrows, RPA Program Manager, General Services Administration (GSA) OCFO

Charter Overview

Fed RPA Community of Practice Charter - Key Points

Mission - Accelerate achievement of RPA benefits through sharing of technical and programmatic information and best practices.

Goals - 30, 60, 90 day and future goals to drive achievement.

Culture - The CoP is a working group, requiring active participation.

Deliverable - Federal RPA Implementation & Operations Guide

Structure - RPA Practice Area Teams with Co-Leaders to produce the RPA Playbook and achieve CoP goals.

Executive Sponsors

CFO & PIO

General Services Administration

Gerard Badorrek

Director

Technology Transformation Services (TTS)

Anil Cheriyan

90 Day and Future Goals

Short-Term Goals (30/60/90 Days)

- **(30 Day) -** Practice leaders are identified for all areas and the CoP structure is finalized.

- **(30 Day)** Robust CoP communications plan is in place generating interest and awareness.

- **(30 Day)** Practice leaders develop an outline, including key issues and approach for each section of the RPA Playbook and draft content by mid-August **(60 Day).**

- The RPA Playbook is fully drafted by mid-Sept. **(60 Day)** and published by mid-October **(90 Day).**

- **(90 Day)** The CoP has created and disseminated at least 4 webinars addressing critical RPA training needs.

- **(90 Day)** The CoP has created and disseminated at least 4 white papers highlighting success cases or other lessons learned.

Future Goals

- Many key operational challenges (e.g., backlogs) are resolved using RPA, leading to high-visibility wins.

- Agency RPA programs use lessons learned from the CoP to advance their missions and meet their goals.

- Within 1-3 years many agencies are sufficiently funded and operating at scale (hundreds of bots) fed by large pipelines and supported by robust, highly secure, and auditable platforms, processes and governance.

Ed Burrows, RPA Program Manager, General Services Administration (GSA) OCFO

Practice Areas Overview

10:15-10:20 AM

CoP Practice Areas

1. **Governance / Center of Excellence**

2. **Human Resources, Culture, Comms**

3. **Management Reporting & Business Case**

4. **Process Selection, Use Cases, Bot Sharing**

5. **Privacy & Ethics**

6. **Bot Credentialing**

7. **RPA & Intelligent Automation / AI**

8. **Operations Management**

9. **Development**

10. **IT Platform**

11. **Security / Authority to Operate (ATO)**

Ed Burrows, RPA Program Manager, General Services Administration (GSA) OCFO

Practice Area Leader Introductions

10:20-10:50 AM

1 2 3 **4** 5 6 7 8

(b) (7)(C)

Practice Area 1: Governance / Center of Excellence

- **Description:** Provide guidance, best practices, tools and methodologies to help agencies efficiently and securely govern and scale RPA programs and operations.
- **Number of Interested Participants:** 53

1 2 3 **4** 5 6 7 8

Practice Area Leader

Office of Personnel
Management
Principal Deputy
Associate Director

Veronica Villalobos

Practice Area 2: Human Resources, Culture, Comms

- **Description:** Guide agencies in managing the human resource impacts of RPA, including effectively re-skilling and re-deploying employees for higher value work that advances agencies missions and increases job satisfaction. Educate employees on RPA and the value to the government and themselves.

- **Number of Interested Participants:** 25

Veronica Villalobos, Principal Deputy Associate Director, OPM

1 2 3 **4** 5 6 7 8

Practice Area Leader

Department of
Housing and Urban
Development
Director – WCF

Kate Mishra

Practice Area 3: Management Reporting & Business Case

- **Description:** Define RPA implementation and operations performance metrics and business case models for agency programs. Gather RPA activity statistics government-wide and report on costs and value generation.

- **Number of Interested Participants:** 42

Practice Area Leaders

Office of the Secretary of Defense

(b) (7)(C)

Federal Reserve System

Bo Shevchik
Office of the Deputy Assistant Secretary of the Army

Christine Gex

Practice Area 4: Process Selection, Use Cases, Bot Sharing

- **Description:** Provide guidance and methods to identify and assess processes for automation that maximize the value of RPA to the government. Identify automations with high potential for sharing across government, and establish a catalog and repository.

- **Number of Interested Participants:** 53

(b) (7)(C), Bo Shevchik – Federal Reserve, Christine Gex - DASA

1 2 3 **4** 5 6 7 8

Practice Area Leader

General Services Administration
Senior Privacy Analyst

Marcela Souaya

Practice Area 5: Privacy & Ethics

- **Description:** Best practices and thought leadership for meeting the intent of privacy and ethics standards for the deployment of RPA within federal agencies.

- **Number of Interested Participants:** 28

1 2 3 **4** 5 6 7 8

Practice Area Leader

Department of the Treasury

Analyst

Jennifer Hill

Practice Area 6: Bot Credentialing

- **Description:** Define bot credentialing options and best practices. Represent the RPA community in policy setting. Assist agencies in implementing and maintaining compliant credentialing platform solutions.

- **Number of Interested Participants:** 24

(b) (7)(C)

Practice Area 7: RPA & Intelligent Automation / AI

- **Description:** Assist agencies in leveraging RPA to implement high-value intelligent automation and artificial intelligence. Educate agencies on IA and AI capabilities and use cases. Identify opportunities to combine RPA and IA / AI to generate value for the government.
- **Number of Interested Participants:** 27

(b) (7)(C)

, Joint Artificial Intelligence Center

Practice Areas

Remaining Practice Areas - Leaders Needed

Practice Area 8: Operations Management

- **Description:** Define options and best practices for scheduling, capacity management, license management, and modifying and fixing bots.
- **Number of Interested Participants:** 21

Practice Area 9: Development

- **Description:** Define options and best practices for developing bots, including code reviews, best approaches and processes, and training.
- **Number of Interested Participants:** 35

Practice Area 10: IT Platform

- **Description:** Define options and best practices for building and operating a secure and scalable IT platform for development, testing and production.
- **Number of Interested Participants:** 17

Practice Area 11: Security / Authority to Operate (ATO)

- **Description:** Define options and best practices for security / ATO approvals. **Number of Interested Participants:** 20

No Leaders

Survey Results & Agency Status Discussion

10:50-11:30 AM

CoP Survey Results

RPA Journey

Pie chart:
- Exploring the Potential: 22.40%
- Application(s) in Production: 37.30%
- Pilot Phase: 40.30%
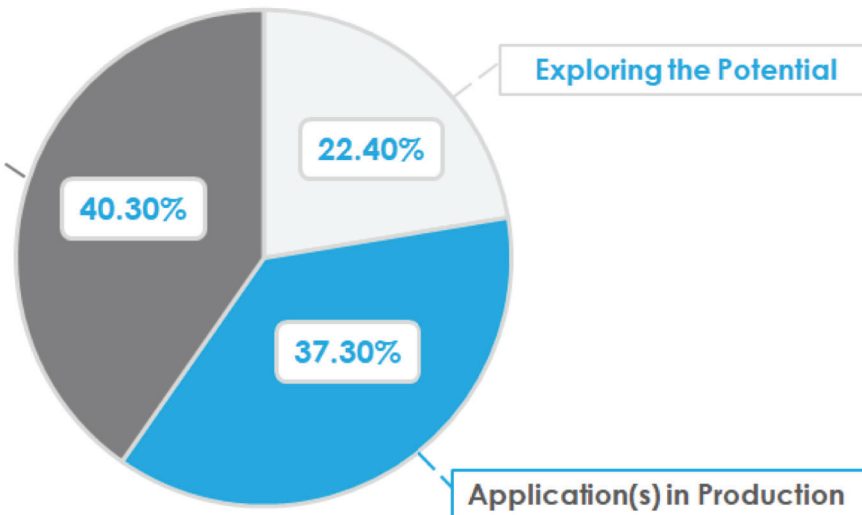
Pilot Phase
- DOD – DFAS
- DOJ
- DOI
- DOT – FAA
- Federal Reserve
- DNI
- SSA

Exploring the Potential
- Commerce
- DOD - Navy
- DOE
- DOL

Application(s) in Production
- USDA
- DOD – Army
- DOD – Secretary of Defense
- HHS
- NASA
- HUD
- State
- Treasury
- VA
- U.S. Courts
- USPS
- DHS
- NSF
- GSA
- OPM
- CIA

Ed Burrows, RPA Program Manager, General Services Administration (GSA) OCFO

Meeting Plan

11:30-11:35 AM

Meeting Plan

- **Practice Area Leaders / Co-Leaders will schedule initial meetings in July.**

    o Meeting agendas, frequency and work allocation will be determined by Practice Leaders.
    o Those who have completed the survey and volunteered to join a team(s) will be invited to attend meetings.
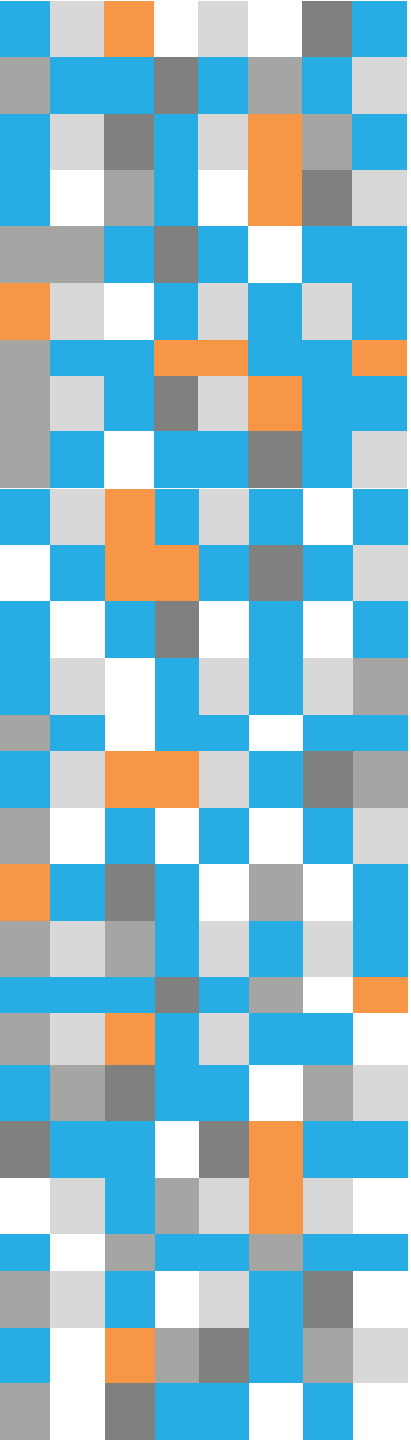
- There will be no full membership meeting in July; the next meeting will be in August (to be scheduled).

- July and August will be used to make progress, which will be reported at the August full membership meeting.

- The leadership team will meet in July and August (to be scheduled).

- Full membership meetings will be scheduled monthly beginning in August.

    o All will be held at GSA HQ with web conferencing available.
    o The agenda for full membership meetings will include: practice area progress readouts and discussion; agency presentations of implementation and operations plans; and guest speakers (can include industry partners working on agency RPA projects).

Next Steps - Community Building

11:35-11:55 AM

Community Building

What should we focus on in the next 90 days to build an effective community?

- **Communication -** what should we communicate within the COP to build and maintain awareness and interest?

- **Knowledge Sharing -** what are the topics or areas of interest that we could address immediately (e.g., through a sponsored event, white paper, or roundtable)?

- **Training and Resources -** what are the training needs and topics that we could address immediately (e.g., through a webinar, training aide, or web posting)?

Administrative Update

11:55 AM-12:00 PM

Overview

- Listserv
    - How to Join the Group
    - How to Leave the Group
- GACA Setup instructions
- Survey

ListServ Group

- How to Join the Group
  - People may subscribe by sending an email to: FEDRPA-subscribe-request@LISTSERV.GSA.GOV
  - No subject line or message in the body is needed.

- How to Leave Group
  - People may unsubscribe by sending an email to: FEDRPA-unsubscribe-request@listserv.gsa.gov.
  - No subject line or message in the body is needed.

GACA Instructions

1. Create a Gmail account at http://mail.google.com/mail/signup

   ○ Enter the first name and last name

   ○ Enter the username: must start with "**GSA.**" then first name, last name - example: **GSA.johnsmith@gmail.com**

   ○ Complete all required fields

2. Accept the Terms of Service and submit the request.

3. Set up 2-Step Verification (also known as two-factor authentication) using a smartphone that can receive simple messages.

GACA Instructions

Instructional letter for additional reference.

U.S. General Services Administration
Office of the GSA IT
www.gsa.gov/cio

Date: May 1, 2017
Subject: Gmail accounts - GSA Affiliated Customer Accounts (GACA) - for sharing in GSA's Google Drive and Google Sites

GSA uses Google to provide employees with a way to collaborate in real time, and to create, edit and share work from anywhere. To enable simliar sharing and collaboration in Google with our government customers and business partners, while also ensuring that this shared information is safeguarded and secure, we've created a specialized Gmail account process called GACA – short for the GSA Affiliated Customer Accounts (GACA). Collaborative data stored on GSA's Google Drive and Google Sites systems are compliant to the Federal Information Processing Standard (FIPS) 140-2. This standard ensures that access and transmission occurs via a secure web page using the TLS 1.2 encryption standard.

Applicability – GACA is for those who work for our government customers and business partners who do not use Google in their workplace. Agencies and civilian partners that are using Google in their workplace do not need to create a GACA account. **GACA accounts must NOT be used by GSA employees and contractors in lieu of a gsa.gov account.**

How to create a GSA Affiliated Customer Account (GACA) in Gmail

The person who will be using the GACA account (the government agency customer or the business partner) must create a Gmail account at http://mail.google.com/mail/signup and follow the process below:

- enter their first name and last name,
- enter their username: must start with "GSA." then first name, last name - example: GSA.johnsmith@gmail.com (mandatory),
- complete all required fields, accept the Terms of Service and submit the request, and
- set up 2-Step Verification (also known as two-factor authentication) using a smart phone that can receive simple messages (mandatory).

The GSA IT Security Staff continuously monitors all shared files in Google Drive, and sharing in GSA's Google Sites. If non-compliance with this process is detected, then our staff will notify users of non-compliance with this process. After notification, if the sharing has been determined to be with a user that maintains a G Suite account, no further action will be required.

Survey

- Once you have your GACA Account set up, take a few minutes to complete the FedRPA Survey
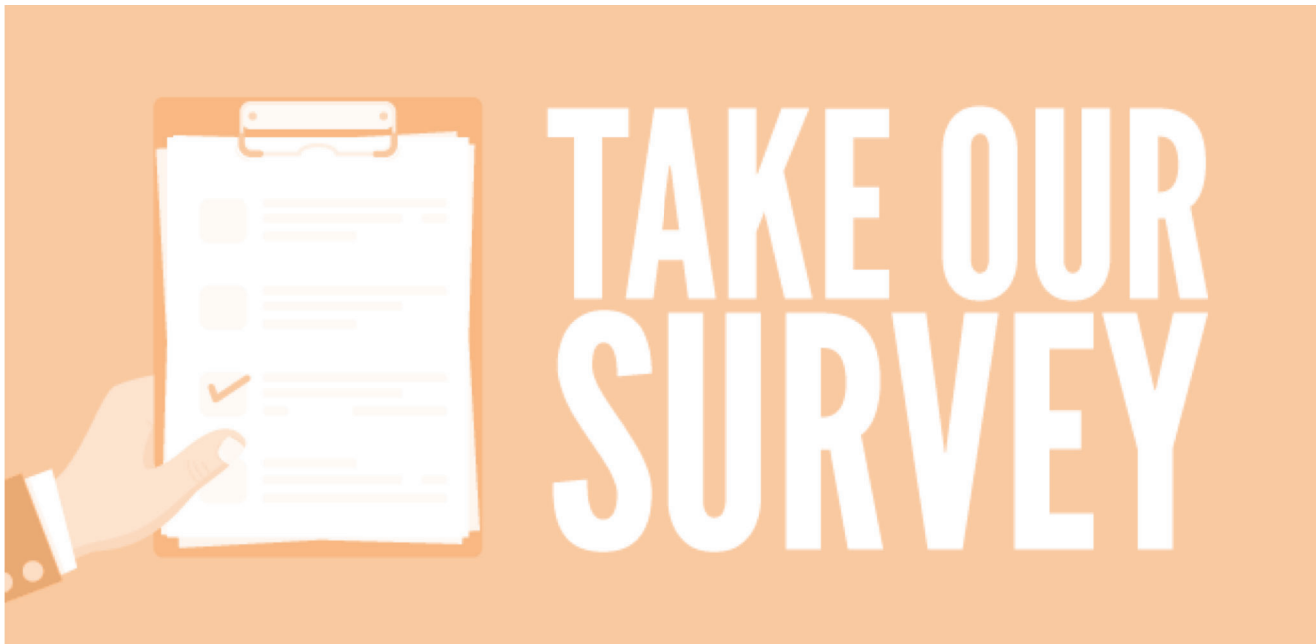
Column	Data Call Field
B	**Submission POC**
C	**Agency**
D	**Department**
E	**Automation Title**
F	**High Level Description**
G	**Business Process Area**
H	**Status**
I	**Annual Labor Hours Automated/Redirected**
J	**Accuracy Improvement**
K	**Compliance or Audit Readiness Improvement**
L	**Process Cycle Time Reduction**

M	**New or Expanded Work Scope**	
N	**Software Vendor**	
O	**Software Version**	
P	**Attended or Unattended**	
Q	**Developer/System Integrator**	
R	**Security Approval**	
S	**Credentialing**	
T	**Government-wide Automation Sharing Potential?**	
U	**Do you have a Use Case for this Automation?**	
V	**Are you willing to share the <u>Use Case</u> with PA's Government Members?**	
W	**Are you willing to share the <u>Automation Code</u> with PA's Government Members?**	
X	**Are you willing to share your data call information with PA's Government Members?**	
Y	**Comments**	

omations developed and/or deployed within the Federal Government. Please complete the "Data Call" tab with informatio
members of the PA, please indicate so in column R.

Guidance to Complete
Free Form Field.
Provide your name as the POC submitting the automation to the data call.
Free Form Field.
Provide the name of your agency (e.g., Department of Defense).
Free Form Field.
Provide the name of the department/office you work in inside your agency (e.g., OUSD(C)).
Free Form Field.
Provide a brief title for the automation.
Free Form Field.
Provide a high level description describing what the automation does.
Drop Down List.
Select which business process area the automation aligns to. If Other, provide more information in the Comments field.
• Acquisition
• Data Management
• Financial Management
• Human Resources
• Information Technology
• Logistics
• Travel
• Other
Drop Down List.
Select the appropriate status the automation is in.
• In Assessment - Automation opportunity has been identified and is being evaluated for whether to move forward.
• In Development - Automation is being developed but has not been tested.
• In Testing - Automation has completed development, and is being tested prior to moving to Production.
• In Production - Automation has been tested and deployed into Production.
Free Form Field.
Provide the number of annual labor hours automated/redirected.
Drop Down List.
Select Yes or No for whether a benefit of this automation is accuracy improvement.
Drop Down List.
Select Yes or No for whether a benefit of this automation is compliance or audit readiness improvement.
Drop Down List.
Select Yes or No for whether a benefit of this automation is process cycle time reduction.

Drop Down List.
Select whether this automation is for new or expanded work scope.
• New - This automation is for a new work requirement.
• Expanded - This automation expands a current work requirement (e.g., allows for 100% data reconciliation/review rathe
Free Form Field.
Provide the name of the software vendor used to develop and deploy the automation.
Free Form Field.
Provide the version of the software used to develop and deploy the automation.
Drop Down List.
Select whether the automation is operated in an attended or unattended state.
• Attended - The automation must be triggered by a human.
• Unattended - The automation can be scheduled to run without a human triggering the action.
Free Form Field.
Provide the name of the developer/system integrator used to develop the automation. If the automation was developed ir
Drop Down List.
Select the appropriate option for the security approval status of this automation:
• None - The agency does not have an Authority to Operate (ATO) for this automation.
• Automation-specific ATO - The agency *has* an ATO specifically for this automation.
• System-specific ATO - The agency has an ATO for a system that covers this automation.
Drop Down List.
Select the appropriate option for the credentialing status of this automation:
• User Credentials - This automation runs using the user's credentials.
• Automation Credentials - This automation runs using its own credentials (non-person entiry - NPE - credentials)
Drop Down List.
Select the appropriate option for whether this automation has potential to be shared/used government-wide.
• Full - This automation can be shared fully with other government agencies.
• Partial - Parts of this automation can be shared with other government agencies.
• None - None of this automation can be shared with other government agencies.
Drop Down List.
Select Yes or No for whether you have a use case (i.e., process definition document) for this automation.
Drop Down List.
Select Yes or No for whether you are willing to share the use case with the Practice Area's Government Members.
Drop Down List.
Select Yes or No for whether you are willing to share the automation code with the Practice Area's Government Members.
Drop Down List.
Select Yes or No for whether you are willing to share your data call information with the Practice Area's Government Meml
Provide any additional information.

POC and Agency Information		
Submission POC	**Agency**	**Department**
Erica Thomas	Department of Defense	Office of the Under Secretary of Defense (Comptroller)

Automation Title
Clearing Unmatched Disbursements in the Defense Agencies Initiative (DAI) System (Oracle accounting system)

Automation Information	
High Level Description	**Business Process Area**
Automate the posting of disbursement information in DAI to clear unmatched disbursements	Financial Management

Status	Annual Labor Hours Automated/Redirected	Accuracy Improvement
In Production	Yes	Yes

Automation Benefits		
Compliance or Audit Readiness Improvement	**Process Cycle Time Reduction**	**New or Expanded Work Scope**
No	Yes	New

Software/Development Information			
Software Vendor	**Software Version**	**Attended or Unattended**	**Developer/System Integrator**
UiPath	2018.4.4	Attended	Guidehouse

Security Approval	Credentialing	Government-wide Automation Sharing Potential?	Do you have a Use Case for this Automation?
		Partial	Yes

Sharing Information		
Are you willing to share the <u>Use Case</u> with the Federal RPA CoP Members?	**Are you willing to share the <u>Automation Code</u> with the Federal RPA CoP Members?**	**Are you willing to share your <u>data call information</u> with the Federal RPA CoP Members?**
Yes	Yes	Yes

Comments

Robotic Process Automation

Federal Community of Practice (CoP)

Realizing the Promise of RPA to Transform Government

Ed Burrows, RPA Program Manager, General Services Administration

Welcoming Remarks

10:00-10:10 AM

Welcoming Remarks

CFO
General Services
Administration (GSA)

Gerard Badorrek

Gerard Badorrek

Gerard Badorrek is the Chief Financial Officer of the U.S. General Services Administration (GSA). As the senior financial executive at GSA, he is responsible for the management of its $25 billion budget and over 600 financial personnel at GSA's central office and across 11 regions. Mr. Badorrek oversees all financial functions and activities, including strategic planning, performance management, budgeting, accounting, analytics and reporting, financial operations and audits. He also serves as GSA's Performance Improvement Officer.

Prior to this role in federal government, Mr. Badorrek spent more than 25 years in the private sector. His expertise in financial management and business operations successfully drove organizational change and improved performance levels at both public and private companies. Mr. Badorrek was a Senior Vice President at Xerox Services, holding positions as a Managing Director and Chief Operating Officer(COO) of the State Government group. He had an extensive career with MCI Communications including roles as Vice President of Finance, Vice President of Business Operations, Executive Director of Corporate Business Analysis and Business Unit CFO and Controller with responsibilities for leading large organizations, building teams and solving complex operational and business problems. He also served as CFO and COO for several private technology companies.

Mr. Badorrek has an MBA degree from the Graduate School of Business at Stanford University, a Master's degree in Economics from Case Western Reserve University and Bachelor degree in Operations Research and Industrial Engineering at Cornell University.

Gerard Badorrek, CFO, General Services Administration (GSA)

Updates and Next Steps, Agenda Review

10:10-10:15 AM

Updates and Next Steps

- Practice area teams making progress

- Following today's meeting, draft a consolidated playbook for review – 9/27/2019

- Final playbook target delivery – 10/25/2019

- CoP needs every agency to provide your existing documentation for your RPA program to the appropriate practice area leaders

- Introducing agency champions

CoP Leadership

Executive Sponsor
Gerard Badorrek
GSA - CFO

Executive Sponsor
Anil Cheriyan
TTS - Director

Community Lead
Edward Burrows
GSA - RPA Program Manager

1. **Governance / Center of Excellence**
   Leaders: (b) (7)(C) - DHS, Anju Anand - NSF, Pam Wolfe - NASA
2. **Human Resources, Culture, Comms**
   Leaders: Veronica Villalobos - OPM, A'ndrea Jones - HUD, (b) (7)(C) - DHS
3. **Bot Credentialing**
   Leaders: Jennifer Hill - Treasury, Elizabeth McEntire - DOD-OSD
4. **RPA & Intelligent Automation / AI**
   Leaders: (b) (7)(C) - DoD-JAIC
5. **Operations Management**
   Leaders: TBD
6. **Management Reporting & Business Case**
   Leaders: James Geoghegan - GSA, Kate Mishra - HUD

7. **Process Selection, Use Cases, Bot Sharing**
   Leaders: (b) (7)(C) - DOD-OSD, Bo Shevchik - FRB
8. **Privacy**
   Leaders: Marcela Souaya - GSA
9. **Development**
   Leaders: Margaret Moon - NSF, Adrienne Barge - HHS, Christine Gex - DASA
10. **IT Platform**
    Leaders: Adrian Carter, USDA
11. **Security / Authority to Operate (ATO)**
    Leaders: Taylor Roberts - OMB, David Harris - DOI, Frank Greenwell - FRB
12. **Contracting**
    Leaders: Harrison Smith - IRS, Tim - Saughnessy, Mitch Winans - IRS

Agenda

10:15-10:25 AM – **Management Reporting & Business Value:** *Jim Geoghegan, General Services Administration (GSA)*

10:25-10:35 AM – **Credentialing:** *Jennifer Hill, Treasury*

10:35-10:45 AM – **Human Resource Impacts, Culture, Comms.:** *Veronica Villalobos, Office of Personnel Management (OPM)*

10:45-10:55 AM – **Process Selection, Use Case and Bot Sharing:** *Ed Burrows, General Services Administration (GSA)*

10:55-11:05 AM – **Governance / Center of Excellence:** (b) (7)(C) , *Department of Homeland Security (DHS)*

11:05-11:15 AM – **Development:** *Christine Gex, Army*

11:15-11:25 AM – **Security / ATO:** *Frank Greenwell, Federal Reserve Board (FRB)*

11:25-11:40 AM – **Survey Results and Review:** *Ed Burrows, General Services Administration (GSA)*

11:40-11:50 AM – **Collaboration Platform:** *Ed Burrows, General Services Administration (GSA)*

11:50-12:00 PM – **Next Steps and Wrap Up**

Ed Burrows, RPA Program Manager, General Services Administration (GSA)

Management Reporting & Business Case

10:15-10:25 AM

Management Reporting & Business Value

Principles & Scope

This practice area will help agencies quantify the cost and value of an RPA program, track performance through a measurement framework, and suggest ways to report results to management.

Principle	What this means...
Not all processes are good candidates for RPA	Agencies must prove the value proposition of implementing a bot
Simple reporting is powerful	Don't make tracking and reporting burdensome
RPA investment decisions should be transparent and documented	This helps with reporting and creates accountability

Kate Mishra (HUD) & James Geoghegan (GSA)

Management Reporting & Business Value

Objectives

1. Help Agencies define the business value being derived from RPA.

2. Identify Cost Categories and develop consistency across the Federal Government.

3. Assist agencies to measure and report on performance and value.

4. Identify investment approaches to implement and grow an RPA program.

Kate Mishra (HUD) & James Geoghegan (GSA)

Management Reporting & Business Value

Current & Planned Practices

How are agencies currently executing in the area?

Implementation Dashboard

- Annual Labor Hours Saved
- Client
- Bot Live Date
- Developer Information
- Months Live
- Hours saved per bot
- Bots Under Evaluation
- Bots in Development
  - Expected Delivery
  - Project Phase
  - Project Complexity

Operations Dashboard

- Transaction Volume
- Trouble Tickets
- Errors
- Up-Time (bot Runtime per day)

Kate Mishra (HUD) & James Geoghegan (GSA)

Management Reporting & Business Value

Investment Considerations

- How much does it cost to launch an RPA program?
- What's the most economical way to proceed?

	Upfront Cost	Risk	Speed
High			
Medium			
Low			
Experience First			

This investment strategy focuses on piloting software and building internal capacity before making a large investment in a RPA platform.

	Upfront Cost	Risk	Speed
High			
Medium			
Low			
Platform First			

This investment strategy purchases a fully functional RPA platform early in the processes minimizing security risk while maximizing capacity.

Management Reporting & Business Value

Evaluation Criteria

What are the criteria for evaluating the effectiveness of the existing practices in meeting the objectives?

Business Value	Management Reporting
Reliability: Do decision makers have reliable data to inform decisions on investing in RPA projects? **Accountability:** Are the value projections reasonable, auditable, and standardized?	**Standard Framework:** Do programs have a strong set of measures they use to manage their RPA projects and to report on the value generated by these projects? **Relevance**: Do performance measures reflect the needs of the customer, end users, organization and process owners? **Awareness:** Does the agency have a compelling dashboard to share information on bot implementation and bot performance?

Kate Mishra (HUD) & James Geoghegan (GSA)

Management Reporting & Business Value

Recommended Best Practices

What is the best practice or best practices recommended by the CoP?

Initial thoughts
Cost: • Use consistent cost categories to track cost • Focus on incremental costs over opportunity costs
Value • Focus on labor hours saved
Business Value • When an agency is ready to scale, an RPA platform provides many benefits included capacity, stability, and security. • Over time, the marginal cost of operating bots will decrease yielding a positive return
Bot Development • A traditional ROI may not be appropriate for each BOT however agencies should document the projected labor hour savings per bot transaction.

Kate Mishra (HUD) & James Geoghegan (GSA)
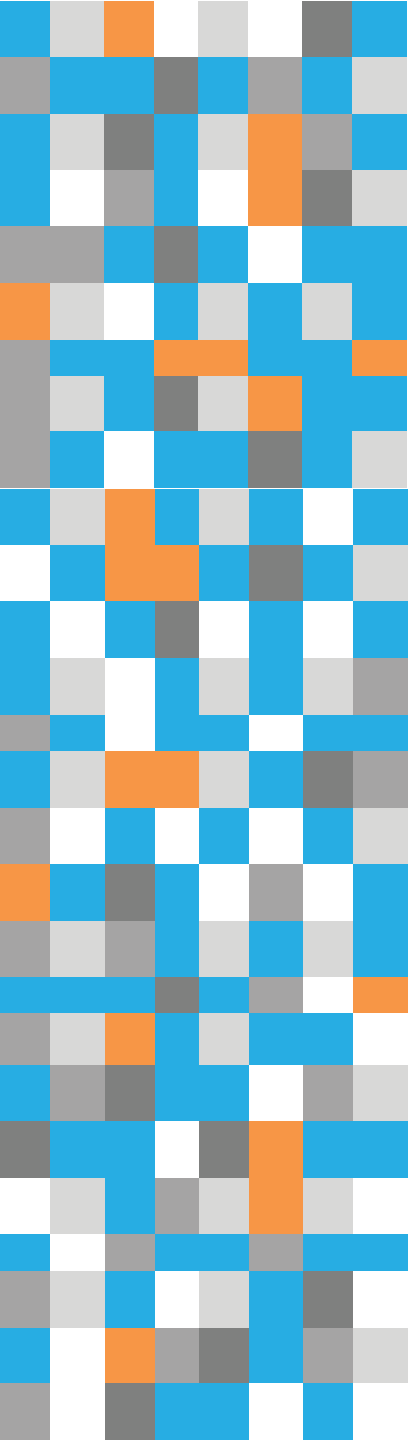
Credentialing

10:25-10:35 AM

Credentialing

Principles & Scope

The Bot Credentialing practice area will focus on the entire lifecycle of bot or non-person entity (NPE) identification. This lifecycle will include the creation and setup of a bot identification, maintenance of credentials, and deregistration or revocation.

Scope:
* ❖ Define bot credentialing options and best practices
* ❖ Determine role/applicability of OMB M-19-17
* ❖ Represent the RPA community in policy setting and assist agencies in implementing and maintaining compliant credentialing platform solutions.

Credentialing

Objectives

1. Develop inventory of best practices across Agencies for the credentialing of bots.

2. Identify best practices and industry trends from private sector resources.

3. Develop recommended steps for granting bots credentials using the same requirements for granting credentials to human entities.

4. Outline Bot credentialing considerations (Policy/Governance, Technical, and Procedural)

Jennifer Hill (Treasury), LaShaun Lucas (Treasury), (b) (7)(C) _____ (DoD)

Current & Planned Practices

Proposed Outline:
I. Authentication Overview
II. Scenarios
    a. Entity Type (Person Based/Non-Person Entity)
    b. Implementation Solution (Unattended/Attended)
    c. Credential Format
    d. Application Account & Role
III. Governance
    a. Sponsorship
    b. Registration
    c. Issuance
    d. Maintenance
    e. Revocation
IV. Access and Control
    a. Role Based
    b. System Access
V. Audit Considerations

Jennifer Hill (Treasury), LaShaun Lucas (Treasury), (b) (7)(C) ████████████ (DoD)

Evaluation Criteria

What are the criteria for evaluating the effectiveness of the existing practices in meeting the objectives?

Maturity of Program

Associated risk
- Security
- SOX/financial audit

Compliance
- NIST FIPS 199
- OMB M-19-7
- Department-Level Identity Governing Bodies

Credentialing

Recommended Best Practices

- Applicability of OMB M-19-17

- Security Standards

- Credentialing Programs:
  - **DLA**
  - **DHS**
  - **Treasury**
  - NASA
  - Army
  - GSA
  - NSF

Human Resource Impacts, Culture, Comms, Change Management

10:35-10:45 AM

Principles & Scope

Principles:

- Align RPA initiatives with the agency's workforce plans and human capital strategies.

- Introduce change management as a practice of applying a structured approach to transition impacted stakeholders of a RPA initiative from the current state to a future state while increasing return on investment (i.e., usage, adoption and competency)

- Identify stakeholders, workforce policies and considerations when beginning RPA initiatives.

Scope: Identify the common "people-dependent" change gaps identified in implementation and deployment of RPA across Federal projects.

Practice Area Leaders: Veronica Villalobos, A'ndrea Jones and Marianne Ndekey

Objectives

- Identify workforce policies and other considerations when planning, implementing and evaluating RPA initiatives.

- Drive the importance of incorporating change management strategies when implementing RPA initiatives

- Improve the employee's experience when implementing RPA initiatives.

- Demystify RPA and reduce resistance by employees and organizations

Current & Planned Practices,
(How are agencies currently executing in the area?)

Current Actions to Collect Agency Practices:
- Human-Centered Design Session(s)
- Current state analysis (qualitative and quantitative)
- Leverage partnership with the Federal Change Management Community of Practice to inform tools
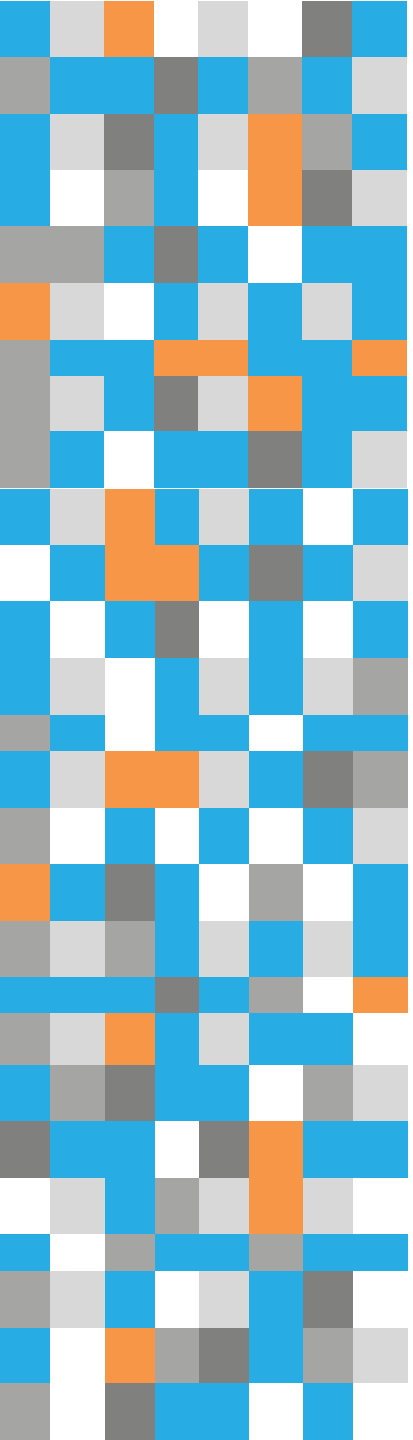
Planned Actions to Collect Agency Practices:
- Identify agency success practices- for example, IRS, GSA and State
- Survey

Recommended Best Practices

- **All Stakeholders involved in the beginning**
- **Executive Sponsorships**
- **Early Involvement of Employees - Surveys**
- **Early Union Involvement**
- **Early Data Analytics**
- **Over Communication**
- **Behavioral Science – Psychology and Behavioral Economics**
- **Celebrate and Communicate Wins**
- **Develop Individual Development Plans up front**

Best Practices will be established based on data driven analysis and successful agency outcomes.

Process Selection, Use Case and Bot Sharing

10:45-10:55 AM

Process Selection, Use Cases, Automation Sharing

Principles & Scope

Identifying and selecting the 'right' processes to automate is critical to the success of an Agency's RPA program and should be documented and integrated into your Center of Excellence and Governance processes. The sharing of use cases and/or automations, will enhance and accelerate the use of RPA, as well as assist with identifying government wide RPA opportunities.

This practice area (PA) focuses on the best practices for the identification, selection, and sharing of automation opportunities & developed automations (automation sharing).

(b) (7)(C) (DoD Comptroller), Christine Gex (Army), Bo Shevchik (FRB)

Process Selection, Use Cases, Automation Sharing

Objectives

1) Develop an inventory of best practices for identification and process selection and prioritization activities (ROI and other benefits included)
2) Develop and maintain an inventory of automations deployed within the Federal Government
3) Develop an inventory of Use Cases, annotating those that may have broader applicability across the Federal Gov
4) Foster collaboration and sharing of Use Cases and automations
5) Develop recommended framework to share automations (best practices)
6) Develop an inventory of automation sharing tools/applications

(b) (7)(C) (DoD Comptroller), Christine Gex (Army), Bo Shevchik (FRB)

Process Selection, Use Cases, Automation Sharing

Current & Planned Practices

How are agencies currently, or planning to:

1) Identify automation opportunities (ex: intake questionnaires, workshops, electronic intake process)

2) Rank and prioritize which automations are developed (ex: assessment criteria, software to help assess/score automation opportunities)

3) Processes/guidelines to sharing automations
What documentation (technical design documents, process definition documents, actual automation code) are people current sharing, or expect to be comfortable sharing in the future?

(DoD Comptroller), Christine Gex (Army), Bo Shevchik (FRB)

Evaluation Criteria

What are the criteria for evaluating the effectiveness of the existing practices in meeting the objectives?

- Associated risk with sharing automations?
- User friendly use case catalog
- User friendly platform for bot sharing

(b) (7)(C) (DoD Comptroller), Christine Gex (Army), Bo Shevchik (FRB)
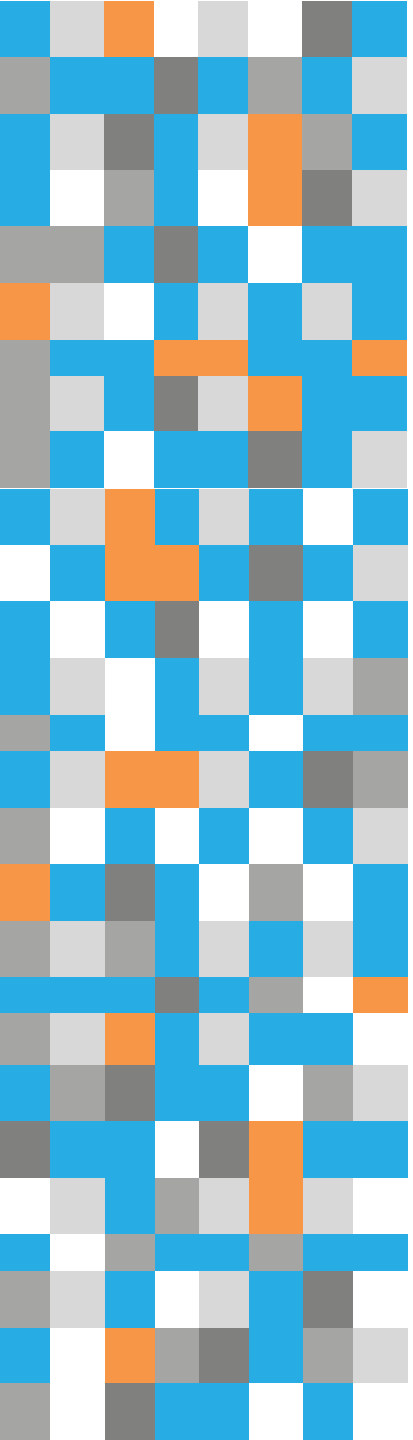
Process Selection, Use Cases, Automation Sharing

Recommended Best Practices

What is the best practice or best practices recommended by the CoP?

- Identification and Process Selection activities – **TBD**
- Use Cases - **TBD**
- Automation Sharing – **TBD**

Gather best practices from WG members and industry partners

Governance and Center of Excellence (CoE)

10:55-11:05 AM

Principle & Scope

Principle: Introduce standards for RPA Governance and Center of Excellence as a structured approach to applying RPA initiatives within government agencies.

Scope: Provide guidance, best practices, tools/templates and methodologies to help agencies efficiently and securely govern and scale RPA programs and operations.

Objectives

- Develop Playbook for RPA Governance Framework and CoE.

RPA Governance Framework

1. Strategic Alignment

    a. Establish RPAs vision and core values through a leadership council.

    b. Align RPA with the organizational mission, objectives and goals through all levels of the organization.

    c. Identify key personnel required to make programmatic decisions and define/develop the governing body to support the operations and evolution of the RPA capability.

    d. Develop a Responsible, Accountable, Consulted, Informed (RACI) Matrix

    e. Develop the RPA communication strategy to the appropriate stakeholders (leadership, management, operations and end-users).

    f. Define IT and application owner involvement to align with operating model and policy compliance.

    g. Establish RPA organization and operational structure.

RPA Governance Framework

2. Capital Planning and Investment Control

    a. Determine RPA Investment needs and funding model.

    b. Complete budget development based on OMB Circular A-11 framework.

    c. Ensures the RPA investments aligns with the operating model.

    d. Complete business case and executives assess how this supports the agency strategic and mission needs.

    e. Conduct investment analysis and align RPA to mission needs and enterprise architecture.

    f. Implement timely oversight, quality control, and executive review, that IT investments are executed or developed in a disciplined, well-managed, and consistent manner.

    g. Develop model to assess investment performance. Once investments are implemented, actual versus expected results are evaluated to:

        • Assess the investment's impact on strategic performance;

        • Identify any changes or modifications to the investment that may be needed;

        • Revise the investment management processes based on lessons learned, self-assessments and benchmarking.

RPA Governance Framework

3. Leadership and Operational Boards*

- **RPA Executive Steering Committee (RPA-ESC)**
  a. Consist of key executive representatives focus on ensuring the RPA capability maintains alignment with Agency mission and objectives.
     - Senior representative from the Executive, CFO, CIO, CISO, Acquisitions Officer, Privacy Officer and primary business units.
  b. Defines the Strategic Direction and Authority.
  c. Prioritizes the RPA Program from an Agency Investment.
     - Funding, Projects, and support.
  d. Facilitate organizational adoption and insertion of RPA.
  e. Act as "Automation" champions across the Agency.

*Apply to Federated and Centralized Deployment Models ONLY

RPA Governance Framework

3. Leadership and Operational Boards*

- **Business Management Council (RPA-BMC)**
  a. Consist of key business level and Operational Support representatives focus on ensuring the operability, maintainability and evolution of the RPA capability is sustained throughout its lifecycle(s).
     a. Operational representatives from the CFO, CIO, CISO, Acquisitions Officer, Privacy Officer and primary business units.
  b. Support aligning business needs with capabilities.
     a. Strategic development and coordination of Infrastructure, Operations and Policy.
     b. Integrate business level RPA priorities.
     c. Establish consumption based "Charge Back" algorithm.
  c. Facilitate organizational awareness and education of RPA within the Agency.
  d. Act as "Automation" ambassadors across the Agency.

*Apply to Federated and Centralized Deployment Models ONLY

RPA Governance Framework

4. Deployment Models

a. Centralized
- Center of Excellent (COE) Model.
- RPA is centrally managed and supports all Business Units.

b. Decentralized
- Business Units operate independent implementation and operation of RPA.

c. Federated
- Business Units operate under an Enterprise RPA Governance Framework.
- Business Units are responsible for delivery, decision making and priority.

RPA Governance Framework Subject Areas

The Governance Framework for the following Subject Areas will be drafted from the corresponding Practice Area playbooks.

5. **Human Resource Impact, Culture Change, Communication**
6. **Management Reporting & Business Case**
7. **Process Selection, Use Cases, Bot Sharing**
8. **Privacy and Ethics**
9. **Bot Credentialing**
10. **RPA & Intelligent Automation / Artificial Intelligence**
11. **Operations Management**
12. **Development**
13. **IT Platform**
14. **Security / Authority to Operate (ATO)**
15. **Contracting**

Evaluation Criteria

What are the criteria for evaluating the effectiveness of the existing practices in meeting the objectives?

- Capacity Enhancements - Increased Processing Volume that quantifies Time & Transactions.

- Increased Quality - Measurable Attributes that enumerates Error Rates, Volume of "Re-Work" & Successful Transactions Counts.

- Compliance Enablement - Automations that address open Audit, Security, Privacy, IT Controls and Business Process Challenges.

- Process Improvement - Re-Vison & Redesign processes though Business Process Reengineer, standardize processes.

Recommended Best Practices

What is the best practice or best practices recommended by the CoP?
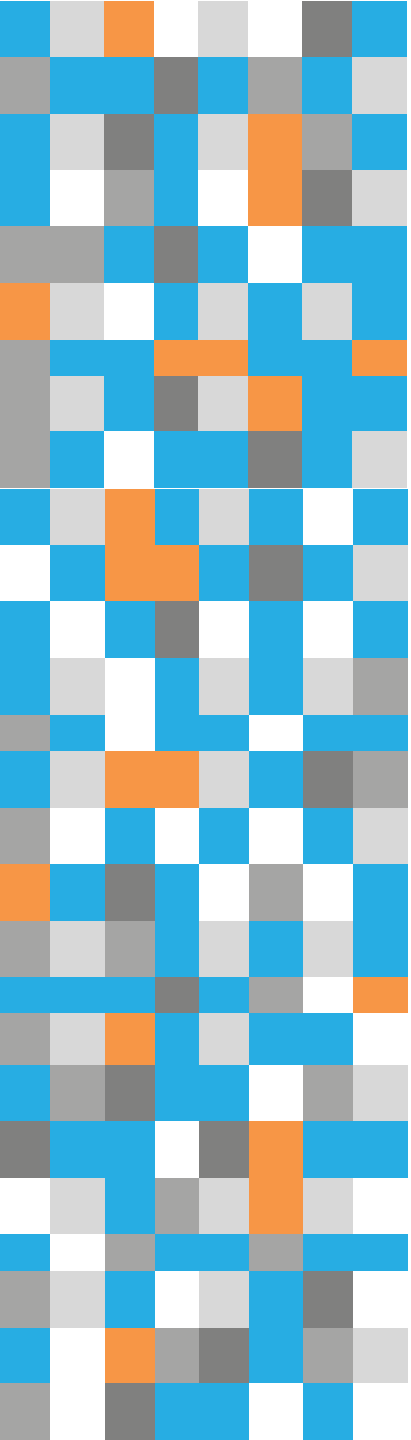
Development

11:05-11:15 AM

Development

Principles & Scope

Robotic Process Automation converts an end user process into a set of system commands that can be executed using the RPA software. For the development of an automation, the process must be documented with the current process at the click level. Automations should be developed with the intent to share everything related to the automation with other federal agencies.

Scope includes all development activities such as development standards, process design documentation, testing, solution design standards, annotation standards, etc., so that the automation is production ready.

Development

Objectives

The key objective of the development practice area is to develop standards – design, code, error handling techniques, logs, development resource (business staff, contractors, IT) etc., that all agencies can use and modify for their purpose.

Current & Planned Practices

How are agencies currently executing in the area?

Development

Evaluation Criteria

Surveying CoP members to determine how many have used the CoP templates and code.

1. High quality, cost effective development
2. Templates: How many agencies have downloaded and used design templates
3. Code: What code was re-used
4. Development Standards: Were CoP development standards useful? What else can should be added?

Recommended Best Practices

1. Keep It Simple: Try to create simple and concise code. Do not overengineer solutions. Simple easy to follow automations are easier to maintain and decreases problems.

2. Pragmatism Trumps Perfection: Better to be timely than perfect. In a fast changing environment, tomorrow may be too late (OBE). Don't wait so long to release.

3. Don't Design Systems Around the Exceptions: Focus on the what yields the most benefit. First create the automation for the majority of cases and refine for exceptions

Security / Authority to Operate (ATO)

10:25-10:35 AM

Developing the Playbook from the Outline - Scope

The purpose of the Government Services Administration (GSA) Federal Robotic Process Automation (RPA) Community of Practice (CoP) is to accelerate the use of RPA across the federal government in order to benefit from cost-effectively automating manual, repetitive, and rule-based operations.

The Security/ATO practice area is one of twelve practice areas of the GSA RPA CoP that will develop and define standards and recommendations for secure RPA implementation and for obtaining and maintaining an Authorization to Operate (ATO) to be included as part of a Federal Government RPA Implementation and Operations Guide.

The Security/ATO practice area will identify and document guidance, methods, options, and best practices of IT security responsibilities for reducing security risks when implementing RPA in federal agencies.

Practice Area Leaders: Frank Greenwell, David Harris, Taylor Roberts

Security / ATO

Developing the Playbook from the Outline - Principles

1. The Security/ATO practice area must integrate with all other RPA Community of Practice (CoP) areas and in particular, RPA Governance, to **ensure coherence with the final work product**: the Federal Government RPA Implementation and Operations Guide.

2. To provide the **broadest possible assessment** of federal RPA practices, the Security/ATO practice area must consider the RPA strategies and activities of numerous federal agencies so that practice area recommendations for information security strategies **support a variety of use cases and business objectives.**

3. Proposed security recommendations should be **flexible** enough to accommodate for diverse agency risk tolerances, while providing clearly articulated guidance on how an agency might authorize RPA technologies in a secure and effective manner **consistent with Federal mandates**.

4. The Security/ATO practice area must identify and document security processes, control design, and documentation that prepares agencies' RPA environments for **security risk mitigated RPA operations, audit readiness, and forensic analysis**.

5. Particular focus will be on unique risk exposures that RPA processes bring to information processing environments and on **various approaches used for mitigation of those risks**.

Practice Area Leaders: Frank Greenwell, David Harris, Taylor Roberts

Objectives

1) **Develop the Security/ATO section of the RPA CoP Playbook by addressing the following areas:**
   A. Standards and Policies
   B. Processes
   C. Monitoring

2) **Document Security/ATO Use Cases (especially your agency's examples).**
   A. Security questionnaires
   B. Security packages
   C. Security checklists
   D. ATO processes
   E. Approaches for Continuous Monitoring
   6) Types of RPA implementations (attended, unattended, hybrid)

3) **Use external resources to identify best practices, industry trends, and government-wide initiatives.**
   A. American Council for Technology and Industry Advisory Council (ACT-IAC)
   B. National Institute of Standards and Technology (NIST)
   C. Advanced Technology Academic Research Center (ATARC)

Practice Area Leaders: Frank Greenwell, David Harris, Taylor Roberts

Developing the Playbook from the Outline – Drilldown 1st Example Only

A. **Standards and Policies**
   1. Formal security policies and procedures
   2. Rules of behavior
   3. Roles and responsibilities
   4. Legal and regulatory compliance (FISMA, Privacy Act, SOX, OMB, etc.)
   5. FedRAMP, where applicable
   6. Environments (Dev, Test, Prod)
   7. Glossary and naming conventions

B. **Processes**
   1. Structured framework (NIST-based)
   2. Assessment and authorization processes (ATO)
   3. Credentialing and authentication
   4. Configuration change management
   5. Incident response and business continuity
   6. Risk mitigation effectiveness and audit readiness

C. **Monitoring**
   1. Continuous monitoring based upon risk/security impact
   2. Internal and technical controls (SP 800-53)
   3. Audit logging
   4. Vulnerability testing

Practice Area Leaders: Frank Greenwell, David Harris, Taylor Roberts

Current & Planned Practices

How are agencies currently executing in the area?

1) RPA whitelisting for particular systems or system boundaries (in ATO terms)

2) Is documentation required for security approval?

3) Is individual bot approval required?

4) Policy and approval criteria with respect to credentialing

5) Audit readiness (*any OIG opinions? GAO?*)

6) Changes to existing cyber security program to respond to unique security risk areas that bot operation presents?

Evaluation Criteria

What are the criteria for evaluating the effectiveness of the existing security practices in meeting the objectives?

(*Especially your agency's experience*)

1) Maturity of agency security and ATO programs and processes.

2) Risk mitigation effectiveness and audit readiness

3) Consistency of agency security programs and processes

4) Security metrics

5) What else???

Recommended Best Practices

What is the best practice or best practices to be recommended by the CoP?

1) Observed and identified best practices by Security/ATO practice area

2) Clear roles and responsibilities for all stakeholders.

3) Steering committees that ensure strategic and consistent use security in implementation of RPA.

4) OMB and GSA will continue to promote alignment and reuse of ATO determinations and closely examine agency-identified obstacles in that effort. (https://cloud.cio.gov/strategy/#security)

5) Alignment with OMB M-18-23, "*Shifting From Low-Value to High-Value Work*"

6) OMB Memorandum M-19-17, titled *Enabling Mission Delivery through Improved Identity, Credential, and Access Management*   (https://cloud.cio.gov/strategy/#security)

Best Practices will be established based on successful agency outcomes and compliance with federal mandates.

Practice Area Leaders: Frank Greenwell, David Harris, Taylor Roberts

Survey Results and Review

11:35-11:50 AM

Survey Results: Results based on 44 respondents from various agencies

Separate Dev/Test Environments

9%

91%

■ Yes ■ No
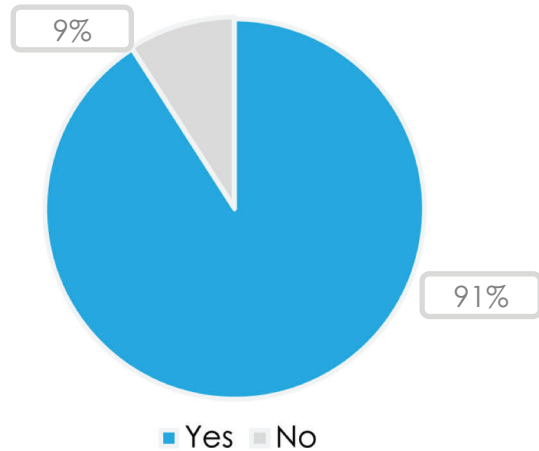
Addressed Intelligent Automation

31%

69%

■ Yes ■ No

Governance Model

55%

45%

■ Federated ■ Centralized ■ Other

Documented Implementation Process

55%

45%

■ Yes ■ No

58
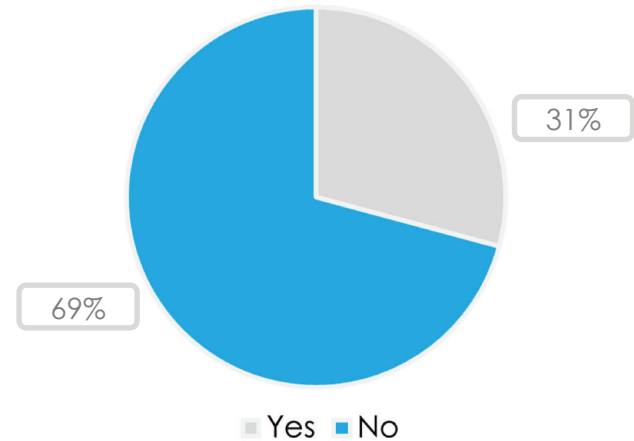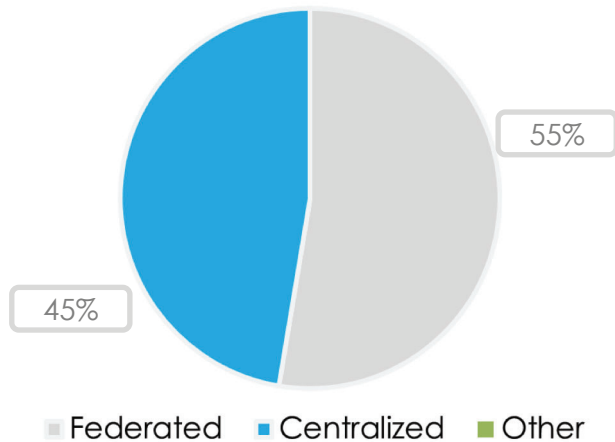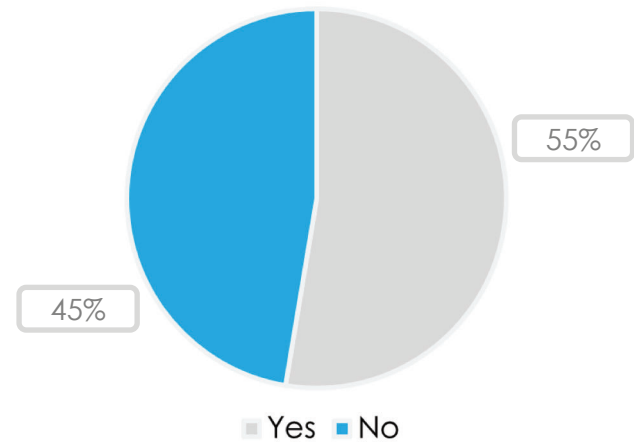
Survey Results

Development Model

- SDLC — 15%
- Agile — 78%
- Combined — 7%

Development Resource

- Business Unit — 37%
- IT — 23%
- Contractor — 40%
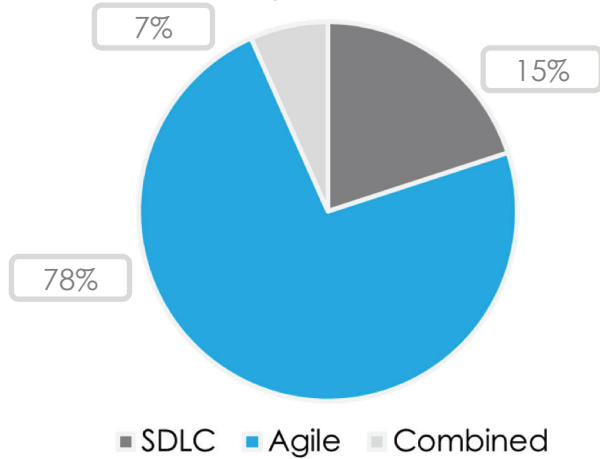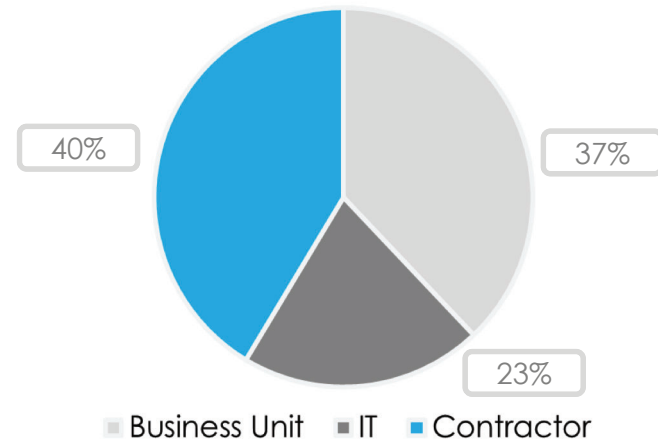
Average Number of Developer FTE per Agency: 7

Development Resource

- Combination — 64%
- Internal — 20%
- Contractors — 16%
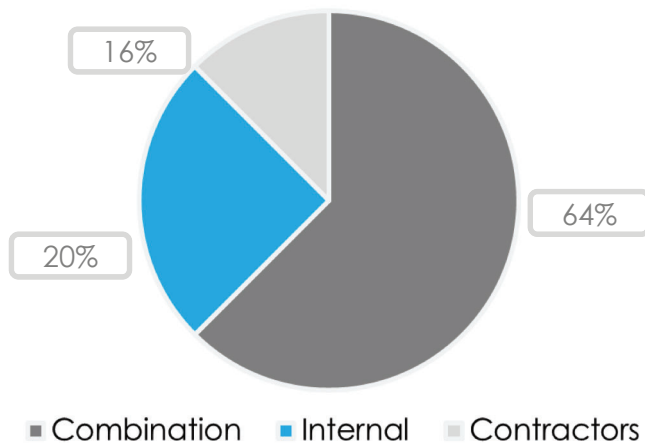
Business Case Model to Develop ROI/Benefits

- Yes — 34%
- No — 66%

59
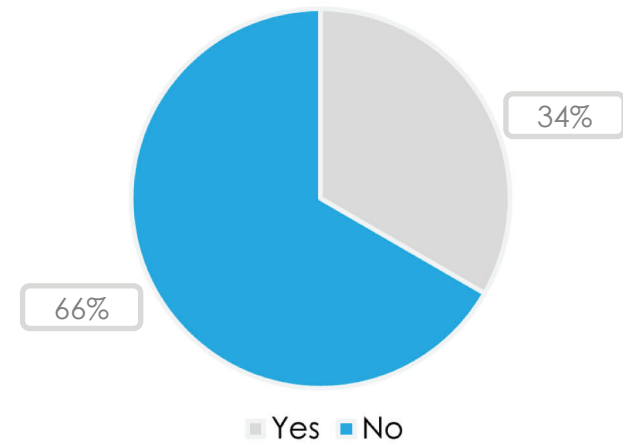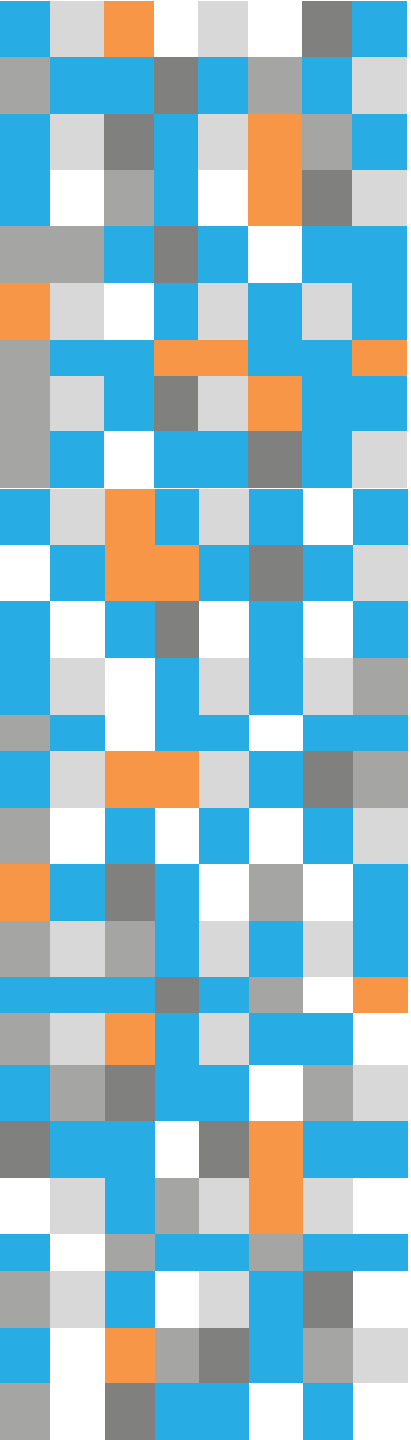
Collaboration Platform

11:50-12:00 PM

Introducing: SAGE

Thanks to ODNI & DIA, we now have access to SAGE, our new:
Collaboration Space!

What we can do:
- Create and collaborate on documents
- Discussion Threads
- Calendar / Events
- Knowledge Sharing
- Bot Sharing

Accessible to:
- Individuals with .gov or .mil accounts
- Others (vendors) per separate process

Next Steps
- PA Leaders will have 2 week window to customize the PA workspaces
- Registration Process:
  - We may contact you for more information
  - You will receive login credentials from SAGE and a follow up from Tracy Harris
  - Log in to activate your account!

Wrap Up – Review of Meeting Objectives

- The CoP can provide great benefit to all agencies, but we need your help.

- Please provide your RPA Program documentation to the appropriate practice area leaders.

- Please join at least one practice area and actively contribute.

- Please give us your feedback!
    - Our mission and approach
    - Suggestions to improve our effectiveness

- Write to RPA@GSA.GOV

Federal
Practice Area
1. Governance / Center of Excellence (CoE)
2. Human Resource Impacts, Culture Change, Communicatio
3. Management Reporting & Business Case
4. Process Selection, Use Cases, Bot Sharing
5/ Privacy & Ethics
6. Bot Credentialing
7. RPA & Intelligent Automation / Artificial Intelligence
8. Operations Management
9. Development
10. IT Platform
11. Security / Authority to Operate (ATO)
12. Contracting

RPA CoP Practice Area Co-Leaders

Co-Leader / Agency	Co-Leader / Agency
(b) (7)(C) (b) (7)(C) @ice.dhs.gov	**Anju Anand, NSF** aanand@nsf.gov
Veronica Villalobos, OPM veronica.villalobos@opm.gov	**A'ndrea Jones, HUD** Andrea.M.Jones@hud.gov
Kate Mishra, HUD katherine.m.mishra@hud.gov	**James Geohegan, GSA** james.geoghegan@gsa.gov
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Frank Greenwell, Fed Board of Governors frank.greenwell@frb.gov	**David Harris, DOI** david_harris@ios.doi.gov
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Taylor Roberts, OMB
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Tim Shaughnessy, IRS
Tim.Shaughnessy@irs.gov

🖶 **Print**

Intelligent Automation in the Government

Curious how others in the public sector are implementing intelligent automation and RPA technology? Join us on Sep. 17 for a free one-hour webinar as we discuss how Intelligent Automation is transforming our government and the important role that AI plays in the process.

During this online session, Automation Anywhere and Cognilytica will address some of the biggest questions about Intelligent Automation, such as:

- How does AI fit into the picture of Intelligent Automation
- What are the things IT leadership need to consider?
- How are Intelligent Automation solutions adopted by the US Federal Government?
- Where can I get the most impact and fastest return with lowest risk?

Details at
https://attendee.gotowebinar.com/register/7501053443683113227?source=AA-SM+Posts

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Federal RPA CoP Members,

We are excited about our third CoP full membership meeting on 9/27 at GSA HQ, 1800 F St. NW, Washington DC from 10-12 ET. Several of the practice area leaders will present their team's draft playbooks, we will also do a more in depth review of survey results, while also having a demo on how to effectively use Sage.

If you wish to attend in person or online, please use the link below to register.
https://www.eventbrite.com/e/september-robotic-process-automation-community-of-practice-meeting-registration-72069629201

Thank you,
Nick Surkamp

🖨 **Print**

Per the conversation during the Process Selection, Use Cases, and Automation Sharing PA meeting this morning, please see the attached response to the data call. Ryan Wisniewski and myself are in the early stages of our initial unattended pilot and are new to the PA, but we are happy to assist when possible.

Thanks!

Derrick Rollins
Certified SAFe Program Consultant
Desk: 5
Cell: (b) (6)

Enterprise Services Center (ESC) | 6500 S. MacArthur Blvd, Oklahoma City, OK 73169

derrick.rollins@faa.gov | www.esc.gov

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Ed Burrows - BGR
Sent: Monday, August 19, 2019 3:42 PM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [FEDRPA] RPA Use Case Data Call

Federal RPA CoP Members,

The CoP's strategy for accelerating the benefits of RPA in the government has three drivers:

1) An **RPA Playbook** to help agencies develop RPA programs and implement in less time and cost, using best practices.
2) A capability for agencies to **share RPA use cases and, where possible, automation code** for partial or full reuse.
3) **Sharing of agency implementation and operations plans**, allowing agencies to use best practice and accelerate deployments. .

The survey sent to you last week is intended to provide the practice area leaders and teams the information needed to develop the playbook. An inventory of use cases is needed to achieve the sharing objective. The survey did not ask for use cases because this information is best collected in a template.

We have developed the attached workbook to collect use cases. Thanks to Erica Thomas and the DoD RPA Consortium for providing the workbook upon which this CoP version is based.

Note: Defense agencies should continue to provide uses case information through the DoD RPA Consortium and not use the attached workbook.   (We were not able to easily remove the defense agency employees from the CoP listseve.)

Non-defense agency CoP members,

Please fill in the Data Call tab of the attached workbook, using the Instructions tab as needed. Please return a completed workbook by 12 noon ET this Thursday if possible. This will allow the use cases to be summarized and presented at the CoP meeting on the 23rd. If it is not possible to make this deadline, please submit it as soon

as possible. Please submit to **nick.surkamp@gsa.gov**. **Do Not** submit to FEDRPA@listserv.gsa.gov as this will go to the full CoP membership.

Note in particular the column in the Data Call sheet for identification of automation sharing capability (None, Partial or Full). This is critical to enable the CoP to benefit from automation sharing.

Thank you for taking the time to respond to last week's survey and this use case data call. We appreciate your efforts on top of your job responsibilities. We are committed to ensuring that the information will be helpful to all agencies in your efforts to benefit from RPA.

Best Regards, Ed

Ed Burrows
Robotic Process Automation Program Manager
Chair, Federal RPA Community of Practice
Office of the Chief Financial Officer (BG)
General Services Administration
1800 F St. NW, Room 6223
Washington, D.C. 20405
Cell: (b) (6)

The difference between try and triumph is just a little *umph*

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Federal RPA Community Members,

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Link to registration: https://www.actiac.org/events/bots-forum

Best Regards, Ed

Ed Burrows
Robotic Process Automation Program Manager
Chair, Federal RPA Community of Practice
Office of the Chief Financial Officer (BG)
General Services Administration
1800 F St. NW, Room 6223
Wash_____405
Cell: (b) (6)

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BOTs Forum

Thursday October 31, 2019

7:30 A.M. - 3:30 P.M.
Renaissance DC Downtown

Register

Join ACT-IAC at the BOTs forum on Halloween day before all the trick or treating activities begin. This day forum will feature:

- Two co-presentations, with a paired government and industry person, discussing their specific BOTs case study
- Two government panels -
  - #1 discussing how three different areas in defense combined their efforts using Robotics Process Automation and BOTs to improve operations and save cost
  - #2 discussing how and why BOTs was used for specific applications and how security, management, and staffing was addressed
- Live case study discussions and demo's from three firms who develop BOTs with the government

Keynote Speaker:
Gerard Badorrek, Chief Financial Officer, General Services Administration (confirmed)

To see a list of the other presenters and the agenda, please visit our website!

Join **ACT-IAC** on **Halloween** to learn, share, and network at the **BOTs** forum.

Training Fees:

Government: ~~$65~~ FREE during the week of September 16th
Industry Member Firm: $395
Industry Non-Member Firm: $595

For sponsorship opportunities, contact (b) (6)

Thank You To Our Sponsors!

Two Fall Forums to Attend!

3D Forum	A Comprehensive Review of
Data Driven Decision-Making – Meeting Mission Needs	**Supply Chain Risk Management**
	Benefits, Threats and Solutions
November 22, 2019	December 3, 2019
Renaissance Washington, DC	Renaissance Washington, DC
8AM – 12PM	8AM – 12PM

Save the Date!

Advancing Government through Education, Leadership and Collaboration

American Council for Technology and Industry Advisory Council | 3040 Williams Drive, Suite 500, Fairfax, VA
22031
Tel: 703.208.4800 | Fax: 703.208.4805 | Email: ACT-IAC@actiac.org

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Hi everyone—we are trying to standardize our documentation here at HUD and were wondering if anyone had sample templates they could share for the following:

- Process Definition Document (PDD)
- Technical Design Document (TDD)
- Testing
- User documentation (although this could be pretty user/process/organization specific)

We already have some samples from Deloitte and KPMG but would be interested in learning about any templates that worked for you. Alternatively, are there any key elements that you've had to incorporate into your documentation (e.g., to be "audit ready")?

Many thanks for any help!

Kate

Kate Skiba Mishra
Director, Working Capital Fund
U.S. Department of Housing and Urban Development
office: 202-402-3912
mobile: (b) (6)

HUD WCF Customer information can be found at: https://community.max.gov/x/qYVTQg

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🖨 **Print**

Do you know if they will have a video feed for those who cannot attend in person?

Michael Griese
U.S. General Services Administration
Office of the Chief Financial Officer
Robotic Process Automation Developer
819 Taylor Street, Fort Worth, TX 76102
O: 817-978-3854

On Wed, Sep 18, 2019 at 7:11 AM Ed Burrows - BGR <edward.burrows@gsa.gov> wrote:

Federal RPA Community Members,

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Robotic Process Automation Program Manager
Chair, Federal RPA Community of Practice
Office of the Chief Financial Officer (BG)
General Services Administration
1800 F St. NW, Room 6223
Wash   405
Cell: (b) (6) ██████

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🖨 **Print**

Hi All,

We at USPTO are venturing on a comparison of different RPA Providers/Platforms. I am interested in any information that members of the group may have on this.

Any help will be appreciated.

Greetings,

John Cyrus (Cyrus)
Portfolio Manager (Corporate). Office of Chief Information Officer, USPTO
Office (571) 270-0805 **I** Mobile (b) (6)   **I** Fax 571-270-9474 **I** John.Cyrus@USPTO.GOV
Madison Building East 10D39, P.O. Box 1450, Alexandria, Virginia 22313
- an agency of the Department of Commerce

🖶 **Print**

Hi All,

We have templates and I'm including Ron Leidner the Director over that area.

Thank you,
Amy

Director, Compliance
Internal Revenue Service
202.688.1482

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Mishra, Katherine M
Sent: Wednesday, September 18, 2019 9:12 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [FEDRPA] RPA templates

Hi everyone—we are trying to standardize our documentation here at HUD and were wondering if anyone had sample templates they could share for the following:

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- Testing
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🖨 **Print**

The FDA/CDER/OTS Team, has implemented an AWS cloud platform call "RAPID" one of the RPA solutions recently implemented with Uipath help reduce a manual process of literature reposts from NIH/NLM to safety evaluators and medical officer in the FDA. This process once took two FTE's 48 hours to run these reports, this is now done in 10 minutes with the RPA solutions.

My thoughts on the comparison of the different platforms

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Uipath seems to be the best option. Let me know if you have any questions.

Regards
Gregory Jackson
FAC-COR Level III/FAC-P/PM Senior
Office Of Translational Sciences
Data Mining and Informatics Evaluation and Research Team
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Please consider the environment before printing this e-mail

FDA U.S. FOOD & DRUG ADMINISTRATION

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From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Cyrus, John
Sent: Wednesday, September 18, 2019 10:31 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [FEDRPA] Comparison of RPA Platforms

Hi All,

We at USPTO are venturing on a comparison of different RPA Providers/Platforms. I am interested in any information that members of the group may have on this.

Any help will be appreciated.

Greetings,

John Cyrus (Cyrus)

Portfolio Manager (Corporate). Office of Chief Information Officer, USPTO
Office (571) 270-0805 **l** Mobile (b) (5) ▓▓▓▓▓ **l** Fax 571-270-9474 **l** John.Cyrus@USPTO.GOV
Madison Building East 10D39, P.O. Box 1450, Alexandria, Virginia 22313
- an agency of the Department of Commerce

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🖨 **Print**

From the various calls I've been on, it seems like most agencies have gone with UI Path. Is there a common Performance Work Statement that everyone is using to bring in UI Path? On one of the calls a few months ago, I heard there was, but never saw any additional information.

Thank you,

Justin C. Borsheim | OCFO Financial Systems Manager
Western Area Power Administration | Headquarters
(O) 720.962.7464

From: Federal Robotic Process Automation [mailto:FEDRPA@LISTSERV.GSA.GOV] **On Behalf Of** Jackson, Gregory
Sent: Wednesday, September 18, 2019 9:34 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [EXTERNAL] Re: [FEDRPA] Comparison of RPA Platforms

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Good morning,

I use a modified version of the templates provided by UiPath at the end of the Business Analyst Training. I'm attaching the originals for you to review. We are early in our pilot but I found these templates in particular more useful as a guide than others I found. Also attaching a cost/ benefit analysis template that we plan on using for RPA evaluation. Hope this helps!

Thanks!

Derrick Rollins
Certified SAFe Program Consultant
Desk: 5
Cell: (b) (6)

Enterprise Services Center (ESC) | 6500 S. MacArthur Blvd, Oklahoma City, OK 73169

derrick.rollins@faa.gov | www.esc.gov

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Mishra, Katherine M
Sent: Wednesday, September 18, 2019 8:12 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [FEDRPA] RPA templates

Hi everyone—we are trying to standardize our documentation here at HUD and were wondering if anyone had sample templates they could share for the following:
- Process Definition Document (PDD)
- Technical Design Document (TDD)
- Testing
- User documentation (although this could be pretty user/process/organization specific)

We already have some samples from Deloitte and KPMG but would be interested in learning about any templates that worked for you. Alternatively, are there any key elements that you've had to incorporate into your documentation (e.g., to be "audit ready")?

Many thanks for any help!

Kate

Kate Skiba Mishra
Director, Working Capital Fund
U.S. Department of Housing and Urban Development
office: 202-402-3912
mobile: (b) (6)

HUD WCF Customer information can be found at: https://community.max.gov/x/qYVTQg

Type

INPUT TYPES

PROCESS STABILITY

APPLICATIONS STABILITY

OVERALL RESULT

BENEFITS

PROCESS COMPLEXITY
INPUT DATA

Ease Of Implementation
Benefit/Suitability

Badwidth Freed (man hours/year)
Error Reduction
Average Handling Time Reduction (AHT Reduction)

Effort to Implement (man hours)

Process Name:
Business Unit:
Main Function:

SME Responsible:
Process Owner:
RPA Business Analyst:

Question

How do the **majority** of your data inputs look like?
How will your process change in the next **6 months?**
How will your applications change in the next **6 months?**

How many **FTEs** are currently needed to perform the process?
What is the **frequency** of the process?
What is the **volume of transactions/frequency** (number of times the process is ran/selected frequency)?
What is the **average time it takes for the process to be ran once** (average handling time/transaction)?

What is the average number of **human errors**?
How would you characterize **the peaks** of the process?
How many **steps** does the process have?
How **difficult** are the decisions that you must take to complete the process?
What is the average number of cases where you are unable to complete the entire process? (Either because you require input form a different person or because you end up in a situation that is not covered by a clear rule)
What is the **number of applications** that you use for the process?
Are any of the applications accessed via **VDI**?
What % of your **input data** is digital?
Is any of your digital input **scanned**?
What % of your input data is structured?

Invoice Processing
GBS - EMEA
Finance & Accounting

Charlie Lee

Satoshi Nakamoto

Nick Carver

Explanation

Digital: any data that can be stored on a machine [server, laptop, IOT devices]
Structured data: has a predictable format, exists in fixed fields (e.g. an xls cell or a field in a form) and is easily detectable via search algorithms. Think about your structured data as: excels, tables with fixed structure, databases where you can easily extract your information through a search function.
Unstructured data: may have its own internal structure, but this is not highly predictable. Examples: web logs, multimedia content, customer service interactions and social media data.

Think about changes of the following type:
- legislative changes that are upcoming and could change the rules/logic of the process.
- organizational changes such as re-distributing bits of the processes between different roles/departments;
- industry shifts that could change the business model and hence the rules of the process;

Think about not only applications but also interfaces, menus in apps and reports.

Optional field

E.g. If the process happens weekly please then we need to know the volume that happens on average during a week.

Please quantify the average handling time in minutes e.g. if 4 hours then insert 240

Structured data: has a predictable format, exists in fixed fields (e.g. an xls cell or a field in a form) and is easily detectable via search algorithms. Think about your structured data as: excels, tables with fixed structure, databases where you can easily extract your information through a search function.

Examples: if your inputs consist of 5 excel files/or ERP reports then 100% of your data is structured, whereas if your input consists of 4 excel files/ERP reports and 1 e-mail text then 80% of your data is structured.

Answers — Result Computation

Answers	Result Computation
Digital and Structured	Feasible
Some change	0.4
Medium Change	0.8

0.6

	0
Daily	
960	
5	

10%	
The process does not have peaks	N/A
10-15 steps	0.2
The process involves complex decisions	0.7
5%	
4-5 aplications	0.6
No	1
100%	
Yes	1.2
>= 80%	0

42%	Medium Effort
88%	High Benefit

0
88%
59%

Rule Based vs Ad-hoc/Judgemental
Possible Answers
Exclusively Rule Based
Mostly Rule Based
Somelevel of subjectivity involved
Mostly subjective
Exclusively Subjective

Type of Input
Possible Answers
Not digital and Unstructured
Non Digital and Structured
Digital and Unstructured
Digital and Structured

Process Stability
Possible Answers
No change expected
Very Small Change
Some change
Medium Change
Significant Change

Applications Stability
Possible Answers
No change expected
Very Small Change
Some change

| Medium Change |
| Significant Change |

ILITY/BENEFIT QUESTIONS

Frequency of the Process
Possible Answers
Daily
Weekly
Bi-weekly
Monthly
Quarterly
Annualy

Process Peaks
Possible Answers
Regular (e.g. month closing), lasting for several days or weeks in a row and increasing the utilization of the team capacity by > 20%
Rare but predictable event (e.g. winter holidays/ yearly closing), lasting for the several days or weeks in a row and increasing the utilization of the team capacity by > 20%
Rare event, hard to predict, of short duration
The process does not have peaks

F IMPLEMENTATION

Number of Steps - complexity proxy
Possible Answers
<=10 steps
10-15 steps
15-25 steps
25-40 steps
>40 steps
Difficulty of decisions

Possible Answers
The process is linear - there are no decisions to be taken
The process involves simple decisions (yes/no type)
The process involves complex decisions

Number of Applications

Possible Answers
1 application
2-3 applications
4-5 aplications
> 5 applications

Thin Client?

Possible Answers
Yes
No

OCR?

Possible Answers
Yes
No

Structured Data vs Un-Structured

Possible Answers
>= 80%
60%-80%
40%-60%
<40%

	Scoring
	Feasible
	Feasible
	Feasible
	Low Feasibility
	Low Feasibility

	Scoring
	Low Feasibility
	Digitize first
	Feasible
	Feasible

	Scoring
	0
	0.2
	0.4
	0.8
	Postpone

	Scoring
	0
	0.2
	0.4

	0.8
	Postpone

	Scoring
These are control questions that are not scored. The frequency x AHT x Volume/frequency will be used to estimat the number of FTEs	

	Scoring
	1
	2
	3
	N/A

1	
	Scoring
	0.1
	0.2
	0.4
	0.6
	1

Scoring
0.1
0.2
0.7

Scoring
0.1
0.3
0.6
1

Scoring
1.6
1

Scoring
1.2
1

Scoring
0
0.4
0.7
1

Average Duration (in months)
Average Team Composition for Enablement

	Low Effort	Medium Effort	High Effort
	0.8	1	2
RPA Project Manager	0.1	0.15	0.2
RPA Change Manager	0.05	0.1	0.2
RPA Program Manager	0.05	0.05	0.1
RPA Business Analyst	0.2	0.4	0.6
RPA Infrastructure Engineer	0.1	0.2	0.3
RPA Solution Architect	0.2	0.4	0.6
RPA Developer	1	2	2.5
RPA Technical Support Manager	0.05	0.1	0.15
RPA Operations Support	0.05	0.1	0.15
TOTAL TEAM	1.44	3.5	9.6
	230	560	1536

Macro Process	Process Name	Sub-Process	Activity	DECISION TYPE Are the **decisions** rule-based or subjective/strategic?
Source to Pay	Invoice to Payment	Invoice Processing		Mostly Rule Based

	FEASIBILITY		
	INPUT TYPE		**PROCESS STABILITY**
Score	How do the **majority** of your data inputs look like?	Score	How will your process change in the next **6 months?**	Score
Feasible	Digital and Structured	**Feasible**	Some change	**0.4**

AUTOMATION POTENTIAL

APPLICATIONS STABILITY		FEASIBILITY	FEASIBILITY SCORE	
How will your process change in the next **6 months?**	Score			What is the **frequency** of the process?
Medium Change	0.8	Feasible	0.6	Daily
		Feasible		
		Feasible		
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		Feasible		

-

PROCESS VOLUMETRY		
What is the **volume of transactions/frequency** (number of times the process is ran/selected frequency)?	What is the **average time it takes for the process to be ran once** (average handling time/transaction)? **(in minutes)**	Equivalent FTEs
960	5	0

BILITY

ERRORS	PROCESS PEAKS
What is the average number of **human errors**?	How would you characterize **the peaks** of the process?
10%	Regular (e.g. month closing), lasting for several days or weeks in a row and increasing the utilization of the team capacity by > 20%

Score	NUMBER OF STEPS		DECISION TYPE	
	How many **steps** does the process have?	SCORE	How **difficult** are the decisions that you must take to complete the process?	SCORE
1	10-15 steps	0.2	The process involves complex decisions	0.7

PROCESS COMPLEXITY

PROCESS DETAILS

EXCEPTIONS	NUMBER OF APPLICATIONS	SCORE	THIN CLIENT
What is the average number of cases where you are **unable to complete the entire process**? (Either because you require input form a different person or because you end up in a situation that is not covered by a clear rule)	What is the **number of applications** that you use for the process?		Are any of the applications accessed via **Citrix/VDI**?
5%	4-5 aplications	**0.6**	No

	INPUT DATA		
	DIGITAL INPUT	**SCANNED INPUT**	
SCORE	What % of your **input data** is digital?	Is any of your digital input **scanned**?	SCORE
1	100%	Yes	1.2

28%

STRUCTURED DATA %		AUTOMATION POTENTIAL	Man Hours Freed
What % of your input data is structured?	SCORE	% Automation	Estimated Bandwidth Freed expressed as man hours/year
>= 80%	0	88%	0

ESTIMATED BENEFIT		
Est. Error Reduction	Est. AHT Reduction	Peak Priority
Expressed as %	Expressed as %	From 3= lowest to 1 = highest
88%	59%	1

ESTIMATED IMPLEMENTATION EFFORT	
Man Hours spent	IMPLEMENTATION
Expressed as man hours	% effort
560	**42%**

RPA COST BENEFIT ANALYSIS TEMPLATE

BUSINESS AREA	
PROPOSED PRODUCT/INITIATIVE/SERVICE	

QUANTITATIVE ANALYSIS	YEAR 1
NON-RECURRING COSTS	
Hardware	
Servers	
Desktop	
Cost of Automation	
Software (Packaged or Custom)	
Infrastructure	
Development	
Business Process Owners (Users)	
Management	
Training of Employees (Pre-Implementation)	
Transition Costs (Parallel Systems)	
Post-Implementation Reviews	
RPA Software	
Licensing Costs	
Cost of Change	
Bot Management Costs	
TOTAL NON-RECURRING COSTS	$ -

RECURRING COSTS	
Hardware/Software	
Software Maintenance and Upgrades	
Computer Supplies	
Desktops (Incremental to the Project)	
Help Desk Support	
Ongoing Additional Labor	
IT Staff Costs (including Benefits)	
User Training	
Other	
Telecommunications	
Office Leases	

TOTAL RECURRING COSTS	$ -
TOTAL COSTS	$ -

QUANTITATIVE BENEFITS	YEAR 1
REVENUES	
(Enter Revenue Sources Here)	
TOTAL REVENUES	$ -
COST SAVINGS	
Decreased Cost of Services Provided	
Savings from Business Process Improvements	
Productivity Gains	
Savings from Structural Changes	
Savings from Optimized Information (or Flow)	
Decreased Information Publishing Cost	
Reduced Staffing Cost (including Overtime)	
Reduced Staff Turnover Costs	
TOTAL COST SAVINGS	$ -
COST AVOIDANCE	
(Enter Cost Avoidance Here)	
TOTAL COST AVOIDANCE	$ -
OTHER BENEFITS	
(Enter Other Benefits Here)	
TOTAL OTHER BENEFITS	$ -
TOTAL BENEFITS	$ -

	DATE CONDUCTED	
	COMPLETED BY	

YEAR 2	YEAR 3	YEAR 4	YEAR 5
$ -	$ -	$ -	$ -

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$ -	$ -	$ -	$ -

YEAR 2	YEAR 3	YEAR 4	YEAR 5
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SIMPLE COST BENEFIT ANALYSIS TEMPLATI

QUANTITATIVE ANALYSIS	YEAR 1	YEAR 2	YEAR 3
BENEFITS			
COST SAVINGS	$ -	$ -	$ -
COST AVOIDANCE	$ -	$ -	$ -
REVENUE	$ -	$ -	$ -
OTHER	$ -	$ -	$ -
TOTAL BENEFITS	**$ -**	**$ -**	**$ -**
COSTS			
NON-RECURRING	$ -	$ -	$ -
RECURRING	$ -	$ -	$ -
TOTAL COSTS	**$ -**	**$ -**	**$ -**
NET BENEFIT OR COST	**$ -**	**$ -**	**$ -**

E

YEAR 4	YEAR 5	TOTAL
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🖨 **Print**

Folks,

Concerning this exchange of software evaluations, I need to add that the CoP itself does not endorse a particular RPA product. However, there is publicly available market research from firms such as Gartner and Forrester. If anyone is interested in that contact me directly at edward.burrows@gsa.gov.

To answer Justin's question (in part), UiPath is not available for direct purchase from a GSA schedule but it can be purchased through resellers who are on the schedules. I suggest that your purchasing person contact UiPath to identify the available resellers. . Regarding the specification of your purchase, it will depend on whether you will have attended or unattended bots and also the number of automations you expect to have and, in the case of unattended bots, the schedule for running them. (A Robot license can be used 24x7 so can often be used to run multiple automations..)

Ed

Ed Burrows
Robotic Process Automation Program Manager
Chair, Federal RPA Community of Practice
Office of the Chief Financial Officer (BG)
General Services Administration
1800 F St. NW, Room 6223
Wash_____405
Cell: **(b) (6)** ██████████

The difference between try and triumph is just a little *umph*

On Wed, Sep 18, 2019 at 12:11 PM Borsheim, Justin <000005f52c08190c-dmarc-request@listserv.gsa.gov> wrote:

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> Thank you,
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> **Justin C. Borsheim | OCFO Financial Systems Manager**
>
> Western Area Power Administration | Headquarters
>
> (O) 720.962.7464
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Gregory Jackson

FAC-COR Level III/FAC-P/PM Senior

Office Of Translational Sciences

Data Mining and Informatics Evaluation and Research Team

Tel: (301) 796-4096

E-mail: gregory.jackson@fda.hhs.gov

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John Cyrus (Cyrus)

Portfolio Manager (Corporate), Office of Chief Information Officer, USPTO

Office (571) 270-0805 I Mobile (b) (6)　　　　Fax 571-270-9474 I John.Cyrus@USPTO.GOV

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Hello Ed,
We are experience road blocks to "Non-Person Credentials", are you able to solve for GSA?
Cyrus

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Ed Burrows - BGR
Sent: Wednesday, September 18, 2019 12:47 PM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: Re: [FEDRPA] [EXTERNAL] Re: [FEDRPA] Comparison of RPA Platforms

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Chair, Federal RPA Community of Practice
Office of the Chief Financial Officer (BG)
General Services Administration
1800 F St. NW, Room 6223
Washington, D.C. 20405
Cell: (b) (6) ▮▮▮▮▮▮▮

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Jackson, Gregory
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E-mail: gregory.jackson@fda.hhs.gov
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FDA U.S. FOOD & DRUG ADMINISTRATION

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Sent: Wednesday, September 18, 2019 10:31 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [FEDRPA] Comparison of RPA Platforms

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Any help will be appreciated.

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Portfolio Manager (Corporate), Office of Chief Information Officer, USPTO
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FDA U.S. FOOD & DRUG ADMINISTRATION

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Yes, I can tell you how we order ours if you would like to call me at 301-796-4096

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Jaye_Kissler@TXWD.USCOURTS.GOV
Sent: Wednesday, September 18, 2019 2:54 PM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: Re: [FEDRPA] [EXTERNAL] Re: [FEDRPA] Comparison of RPA Platforms

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Hi Kate,

Our team reviewed TDDs/SDDs samples from multiple sources, taking into account initial auditor questions some organizations received, to narrow down to our current Solution Design Document (SDD) format. Attached is a sample of our DoD Comptroller SDD. We create/maintain an SDD and a high level Use Case (also attached) for each automation we develop. That said, we are currently in the process of retroactively applying this to some of our initial/ earlier automations.

If you would like to discuss, please feel free to give me a call.

r/ Erica

Erica E. Thomas
OUSD Comptroller, Chief Data Transformation Office
RPA Program Manager
Office: (b) (6)
Mobile: (571) 319-6799
erica.e.thomas.civ@mail.mil

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Mishra, Katherine M
Sent: Wednesday, September 18, 2019 9:12 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [Non-DoD Source] [FEDRPA] RPA templates

All active links contained in this email were disabled. Please verify the identity of the sender, and confirm the authenticity of all links contained within the message prior to copying and pasting the address to a Web browser.

Hi everyone—we are trying to standardize our documentation here at HUD and were wondering if anyone had sample templates they could share for the following:
- Process Definition Document (PDD)
- Technical Design Document (TDD)
- Testing
- User documentation (although this could be pretty user/process/organization specific)

We already have some samples from Deloitte and KPMG but would be interested in learning about any templates that worked for you. Alternatively, are there any key elements that you've had to incorporate into your documentation (e.g., to be "audit ready")?

Many thanks for any help!

Kate

Kate Skiba Mishra
Director, Working Capital Fund
U.S. Department of Housing and Urban Development
office: 202-402-3912
mobile: (b) (6)

HUD WCF Customer information can be found at:Caution-https://community.max.gov/x/qYVTQg < Caution-https://community.max.gov/x/qYVTQg >

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Folks,

I am sending this message on behalf of Bo Shevchik of the Federal reserve Board of St. Louis. Please respond directly to to me bo.shevchik@stls.frb.org.

Thanks, Ed

This is an "In Search of" Request for **Automation Sharing for Invoicing.**

Please share any information you may have on RPA you are using associated with your invoicing process.

Examples of RPA from the Invoice Processing Platform (www.IPP.gov).

Agencies

Agency A – using UiPath

- **RPA Activity: Aging Invoices Management**
- **RPA Activity: Utility Invoices**

Vendors

Vendor A – using Blue Prism

Vendor B – using UiPath

- **RPA Activity: Invoice submission using RPA**

I'm happy to discuss the above with anyone interested

Please respond to me bo.shevchik@stls.frb.org and or the LISTSRV listserv@listserv.gsa.gov .

Respectfully,

Bo Shevchik, CGFM, PMP

Federal RPA CoP

Co-Lead Automation Sharing Practice Area

Outreach and Marketing Strategy

Invoice Processing Platform (IPP)
www.IPP.gov

Federal Reserve System

241 18th Street S, Suite 510

Arlington, VA 22202

(202) 759-0696 Office

(b) (6)

bo.shevchik@stls.frb.org

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🖨 **Print**

Good afternoon Ed - would you please share the Gartner and Forrester RPA industry reports with me? I'm a member of a team of COs within QTA that has been tasked with gaining greater knowledge related to several key emerging technologies, which includes RPA.

Thanks!
Tracey Embry | (Office) 703.306.7041 / (mobile) (b) (6)
Contracting Officer
Shared Services & IT Products Contract Operations (QT2A1AA)
Office of Information Technology Category (ITC)
Federal Acquisition Service (FAS)
U.S. General Services Administration (GSA)

ACQUISITION GATEWAY

On Wed, Sep 18, 2019 at 12:47 PM Ed Burrows - BGR <edward.burrows@gsa.gov> wrote:
Folks,

Concerning this exchange of software evaluations, I need to add that the CoP itself does not endorse a particular RPA product. However, there is publicly available market research from firms such as Gartner and Forrester. If anyone is interested in that contact me directly at edward.burrows@gsa.gov.

To answer Justin's question (in part), UiPath is not available for direct purchase from a GSA schedule but it can be purchased through resellers who are on the schedules. I suggest that your purchasing person contact UiPath to identify the available resellers. . Regarding the specification of your purchase, it will depend on whether you will have attended or unattended bots and also the number of automations you expect to have and, in the case of unattended bots, the schedule for running them. (A Robot license can be used 24x7 so can often be used to run multiple automations..)

Ed

Ed Burrows
Robotic Process Automation Program Manager
Chair, Federal RPA Community of Practice
Office of the Chief Financial Officer (BG)
General Services Administration
1800 F St. NW, Room 6223
Wash   405
Cell: (b) (6)

The difference between try and triumph is just a little *umph*

On Wed, Sep 18, 2019 at 12:11 PM Borsheim, Justin <000005f52c08190c-dmarc-request@listserv.gsa.gov> wrote:

From the various calls I've been on, it seems like most agencies have gone with UI Path. Is there a common Performance Work Statement that everyone is using to bring in UI Path? On one of the calls a few months ago, I heard there was, but never saw any additional information.

Thank you,

Justin C. Borsheim | OCFO Financial Systems Manager

Western Area Power Administration | Headquarters

(O) 720.962.7464

From: Federal Robotic Process Automation [mailto:FEDRPA@LISTSERV.GSA.GOV] **On Behalf Of**
Jackson, Gregory
Sent: Wednesday, September 18, 2019 9:34 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [EXTERNAL] Re: [FEDRPA] Comparison of RPA Platforms

The FDA/CDER/OTS Team, has implemented an AWS cloud platform call "RAPID" one of the RPA solutions recently implemented with Uipath help reduce a manual process of literature reposts from NIH/NLM to safety evaluators and medical officer in the FDA. This process once took two FTE's 48 hours to run these reports, this is now done in 10 minutes with the RPA solutions.

My thoughts on the comparison of the different platforms

Uipath pricing is customized based on contract size and uipath is competitively aggressive and is the most widely used as compared to the other two. It's the fastest growing option and easy to train. You can find great videos, Freeware, lots of Forum, lots of free training and free certifications which is one of Uipath's greatest strength but we will not have to worry since this would be supported by the contractor.

UIPATH I believe would require less overhead compared to Blueprism since Orchestrator/Control Rooms doesn't mandate you to buy Orchestrator. I believe all other products mandate you to use their control room which is an overhead cost. The ability to link to other processes and the development speed to implement seems faster compared to others.

Also the Cognitive (OCR, NLP, Unstructured documents): This is a major over and above Uipaths Capability as of Today. Uipath is not the solution provider but it partners with other products like Google, Microsoft, Abby OCR, WATSON. Accuracy is the key to limiting manual involvement otherwise this process would still require manual and redundant work.

Uipath seems to be the best option. Let me know if you have any questions.

Regards

Gregory Jackson

FAC-COR Level III/FAC-P/PM Senior

Office Of Translational Sciences

Data Mining and Informatics Evaluation and Research Team

Tel: (301) 796-4096

E-mail: gregory.jackson@fda.hhs.gov

Please consider the environment before printing this e-mail

FDA U.S. FOOD & DRUG
ADMINISTRATION

Please click here to provide feedback on the customer service you have received.

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Cyrus, John
Sent: Wednesday, September 18, 2019 10:31 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [FEDRPA] Comparison of RPA Platforms

Hi All,

We at USPTO are venturing on a comparison of different RPA Providers/Platforms. I am interested in any information that members of the group may have on this.

Any help will be appreciated.

Greetings,

John Cyrus (Cyrus)

Portfolio Manager (Corporate), Office of Chief Information Officer, USPTO

Office (571) 270-0805 I Mobile **(b) (6)** I Fax 571-270-9474 I John.Cyrus@USPTO.GOV

Madison Building East 10D39, P.O. Box 1450, Alexandria, Virginia 22313

- an agency of the Department of Commerce

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🖨 **Print**

Federal RPA CoP Members,

We are excited about our third CoP full membership meeting on 9/27 at GSA HQ, 1800 F St. NW, Washington DC or virtually from 10-12 ET. Several of the practice area leaders will present their team's draft playbooks, we will also do a more in depth review of survey results, while also having a demo on how to effectively use Sage.

If you wish to attend in person or online, please use the link below to register:
https://www.eventbrite.com/e/september-robotic-process-automation-community-of-practice-meeting-registration-72069629201

Regards,
Nick

🖨 **Print**

Reminder: Today is the last day of free registration for the ACT-IAC BOTs Forum on Oct. 31st.

Ed

Ed Burrows
Robotic Process Automation Program Manager
Chair, Federal RPA Community of Practice
Office of the Chief Financial Officer (BG)
General Services Administration
1800 F St. NW, Room 6223
Wash   405
Cell: (b) (6) ████████

The difference between try and triumph is just a little *umph*

---------- Forwarded message ---------
From: **ACT-IAC** <act-iac@actiac.org>
Date: Fri, Sep 20, 2019 at 11:33 AM
Subject: BOTs Forum - Free Registration Ends Today
To: <edward.burrows@gsa.gov>

BOTs Forum

"Getting to the **BOT**tom Line of RPA"

Thursday October 31, 2019

7:30 A.M. - 3:30 P.M.

Renaissance DC Downtown

Register

Many government agencies are looking to a BOTs solution to improve efficiencies, reduce unnecessary cost, and enable staff to focus on more strategic and meaningful tasks. Join us on Halloween day to learn, share, and interact with industry and academia. Hear from several government and industry co-presenters on their use and outcomes with BOTs as well as two government panels on how they addressed security, management, staffing, and transition from pilot to full operations. Finally, hear from those firms doing BOTs how they evaluated, implemented, changed, and transitioned to a BOTs. This forum is the place to learn what is working successfully and what your agency can consider.

Keynote Speaker:
Gerard Badorrek, Chief Financial Officer, General Services Administration

Join **ACT-IAC** on **Halloween** to learn, share, and network at the BOTs forum.

For more information, please visit our website!

Training Fees:
Government: $0 Special offer through September 20th. Take advantage of this now and register today.

Save the Date!

Advancing Government through Education, Leadership and Collaboration

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🖨 **Print**

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If you wish to attend in person or online, please use the link below to register:
https://www.eventbrite.com/e/september-robotic-process-automation-community-of-practice-meeting-registration-72069629201

Regards,
Nick

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🖶 **Print**

All,

Looking forward to today's CoP meeting. We are looking to have approximately 170 people in attendance both in-person and virtually. For those of you who will not be able to watch the zoom presentation, you can following along with the slides attached to this email.

https://www.eventbrite.com/e/september-robotic-process-automation-community-of-practice-meeting-registration-72069629201

Regards,
Nick

Robotic Process Automation

Federal Community of Practice (CoP)

Realizing the Promise of RPA to Transform Government

Gerard Badorrek, Chief Financial Officer, General Service Administration
Ed Burrows, RPA Program Manager, General Services Administration
Jim Geoghegan, Acting Chair – Federal RPA CoP, General Services Administraton

Welcoming Remarks

10:00-10:10 AM

Welcoming Remarks

Ed Burrows

Edward Burrows is the Robotics Process Automation (RPA) Program Manager at GSA for the Office of the Chief Financial Officer, the Chair of the Federal RPA Community of Practice and the Government Co-Chair of the ACT-IAC Intelligent Automation Working Group.

Ed is the 2019 recipient of the Leadership in Technology Innovation Award of the Association of Information Resource Management (AFFIRM). Under Ed's leadership the GSA RPA Program received the 2019 GCN Government Innovation Award.

Prior to joining GSA in 2015 Ed led financial operations and programs in the telecommunications industry, including senior leadership positions at MCI, Concert Communications, BT Group, and Telarix.   Ed holds a B.A. in Economics from The Pennsylvania State University and a M.A. in Economics from University of Virginia.

RPA Program Manager
General Services Administration (GSA)

Ed Burrows

Ed Burrows, RPA Program Manager, General Services Administration (GSA)

Agenda Review, Meeting Objectives

10:10-10:15 AM

Agenda

10:15-10:30 AM – **Community of Practice: Next Steps:** *Gerard Badorrek, General Services Administration (GSA)*

10:30-10:35 AM – **Management Reporting & Business Value:** *Jim Geoghegan, General Services Administration (GSA)*

10:35-10:40 AM – **Process Selection, Use Case and Automation Sharing:** (b) (7)(C) *, Office of the Secretary of Defense (DoD)*

10:40-10:45 AM – **Governance / Center of Excellence:** (b) (7)(C) *, Department of Homeland Security (DHS)*

10:45-10:50 AM – **IT Platform:** (b) (7)(C) *, Department of Homeland Security (DHS)*

10:50-10:55 AM – **Credentialing:** *Jennifer Hill, Treasury - FIT*

10:55-11:00 AM – **Security / Authority to Operate:** *Frank Greenwell, Federal Reserve Board (FRB)*

11:00-11:05 AM – **Development:** *Margaret Moon, National Science Foundation (NSF)*

11:05-11:10 AM – **Privacy:** *Richard Spiedel, General Services Administration (GSA)*

11:10-11:15 AM – **Operations Management:** *Nick Surkamp, General Services Administration (GSA)*

11:15-11:20 AM – **Human Resources, Culture, Comms, Change Management:** *Veronica Villalobos, Office of Personnel Management (OPM)*

11:20-11:25 AM – **Contracting:** *Mitch Winans, Internal Revenue Service (IRS)*

11:25-11:30 AM – **RPA to AI:** (b) (7)(C) *, Joint Artificial Intelligence Command (DoD)*

11:30-11:45 AM – **Survey Results:** *Ed Burrows, General Services Administration (GSA)*

11:45-11:50 AM – **Collaboration Platform Demo: SAGE:** *Nick Surkamp, General Services Administration (GSA)*

11:50-12:00 PM – **Closing Remarks:** *Jim Geohegan, General Service Administration (GSA*

Agency Champions

Confirmed Agency Champions

(b) (7)(C) ████████████ – Department of Defense (OSD)

John Felsted – Defense Logistics Agency (DLA)

Mark Reuter – Deparment of the Interior (DOI)

James Nigh – Treasury (Fiscal Services)

Steve Aube – Federal Aviation Administration (FAA)

Clint Loeser – Department of Veteran Affairs (VA)

Jaye Kissler – United State Courts (US Courts)

Roy Garris – Social Security Administration (SSA)

(b) (7)(C) ████████ – Department of Homeland Security (DHS)

Community of Practice: Next Steps

10:15-10:30 AM

RPA CoP – Facilitating Rapid Government-wide Adoption of Robotic Process Automation (RPA)

CoP designed to share best practices from advanced Federal RPA Programs.

CoP Overview

600+ Members, Launched in May 2019

40+ Agencies Represented

CoP Mission:

- Solve technology, management, and operational challenges that slow Federal adoption of RPA.
- Provide knowledge management and mentoring support for emerging Federal RPA programs.

CoP Obstacles / Challenge Areas

RPA Management:
- Governance / Center of Excellence (CoE)
- Human Resources Impact, Culture, Communication, and Change Management
- Management Reporting & Business Value
- Process Selection, Use Cases & Automation Sharing
- RPA & Intelligent Automation
- Contracting

RPA Technology:
- Privacy
- Bot Credentialing
- IT Platform
- Security / Authority to Operate (ATO)

RPA Operations:
- Operations Management
- Development

CoP Current Initiatives

✓ **Industry Day:** Over 200 attendees gathered to share their RPA experiences and learn new capabilities from industry experts.

Government-Wide Reporting: Establish common metrics for reporting Federal RPA progress and impact.

Technology Standards: Recommended RPA standards for credentialing, platform, ATO, and privacy.

Functional Workshops: Events for finance, procurement, IT, and human resources to discuss RPA strategies and use cases.

RPA Playbook: A primer of strategies, best practices, and lessons learned for starting and evolving a Federal RPA program.

Use Case Inventory / Bot Sharing: Creating a portal with sample use cases for cross-government sharing of bot ideas.

RPA Potential in Federal Government

10 Hours Per Federal Employee = $1.4B
20 Hours Per Federal Employee = $2.8B
40 Hours Per Federal Employee = $5.6B

GSA Current RPA Program – 5.5 Hours Per Employee
GSA Goal for RPA Program – 40 Hours Per Employee

Benefits Other Than Efficiency: 1) Increased Quality; 2) Increased Compliance; 3) New Services; 4) Enhanced Customer Experience; 5) Improved Analytics; and 6) Cheap Systems Integration.

Federal RPA Landscape

Level 1: Start-Up RPA Programs	Level 2: Emerging RPA Programs	Level 3: Impactful RPA Programs	Level 4: High-Performing RPA Programs
~ 25 Programs	5-10 Programs*	~ 5 Programs	0 Programs

Maturity Level 1:

- Pilot bots or <5 bots in production.
- Less than 5k hours of annualized capacity created.
- Establishing formal processes related to RPA.

Maturity Level 2:

- 5-20 bots in production
- 5-50k hours of annualized capacity created.
- Initial security, privacy, and ATO policies formally defined.
- Developing program management, reporting, and process improvement capabilities.

Maturity Level 3:

- 20+ bots in production
- 50-100k hours of annualized capacity created.
- Formal ATO, IT Security, and Privacy policies.
- Strong program and operations management.
- RPA solutions implemented across organizations within the agency.
- Strong process improvement capabilities.
- Robust pipeline of future opportunities.

Maturity Level 4:

- 5-10 bots deployed monthly.
- 100k+ hours of annualized capacity created.
- COE Model - bots generated from multiple business units
- Intelligent automation capabilities.
- Dedicated (FTE) program management, process reengineering, and development capabilities.
- Workforce redeployment, capacity planning, and reskilling required.
- Enterprise Platform for unattended bots.

* Best estimate based on surveying

Management Reporting & Business Value

10:30-10:35 AM

Practice Area Leaders

Jim Geoghegan: *General Services Administration (GSA)*

Kate Mishra: *Department of Housing and Urban Development (HUD)*
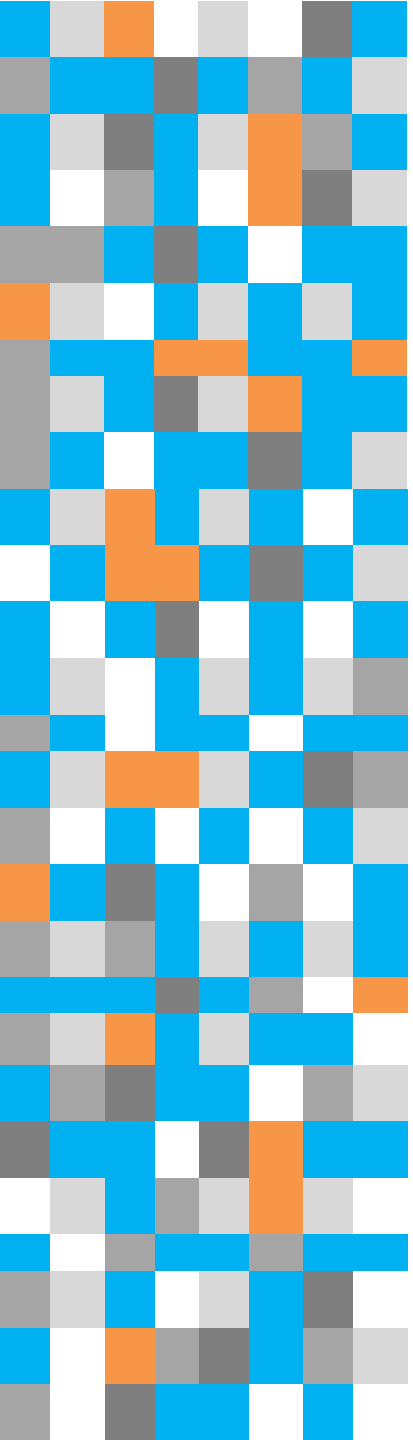
Process Selection, Use Case and Automation Sharing

10:35-10:40 AM

Practice Area Leaders

(b) (7)(C): *Office of the Secretary of Defense (DoD)*

Bo Shevchik: *Federal Reserve Board (FRB)*

Governance and Center of Excellence (CoE)

10:40-10:45 AM

Practice Area Leaders

(b) (7)(C) : *Department of Homeland Security (DHS)*

Anju Anand: *National Science Foundation (NSF)*

Pam Wolfe: *National Aeronautics and Space Administration (NASA)*

IT Platform

10:45-10:50 AM

Practice Area Leaders

(b) (7)(C) : *Department of Homeland Security (DHS)*

Anju Anand: *National Science Foundation (NSF)*

Pam Wolfe: *National Aeronautics and Space Administration (NASA)*

Credentialing

10:50-10:55 AM

Practice Area Leaders

Jennifer Hill: *Treasury – FIT*

(b) (7)(C) ██████████████████ : *Office of the Secretary of Defense (DoD)*

Security / Authority to Operate (ATO)

10:55-11:00 AM

Practice Area Leaders

Frank Greenwell: *Federal Reserve Board (FRB)*

David Harris: *Department of the Interior (DOI)*

Taylor Roberts: *Office of Management and Budget (OMB)*

Development

11:00-11:05 AM

Practice Area Leaders

Christine Gex: *Deputy Assistant Secretary of the Army – FIM (DoD)*

Margaret Moon: *National Science Foundation (NSF)*

Privacy

11:05-11:10 AM

Practice Area Leaders

Richard Spiedel: *General Services Administration (GSA)*

Marcela Souaya: *General Services Administration (GSA)*

Operations Management

11:10-11:15 AM

Practice Area Leader

Nick Surkamp: *General Services Administration (GSA)*

Human Resource Impacts, Culture, Comms, Change Management

11:15-11:20 AM

Practice Area Leaders

Veronica Villalobos: *Office of Personnel Management (OPM)*

Marianne Ndekey: *Office of Personnel Management (OPM)*

A'ndrea Jones: *Department of Housing and Urban Development (HUD)*

Contracting

11:20-11:25 AM

Practice Area Leaders

Harrison Smith: *Internal Revenue Service (IRS)*

Tim Shaughnessy: *Internal Revenue Service (IRS)*

Mitch Winans: *Internal Revenue Service (IRS)*

RPA to AI

11:25-11:30 AM

Practice Area Leader

(b) (7)(C) *: Joint Artificial Intelligence Command (DoD)*

Survey Results and Review

11:30-11:45 AM
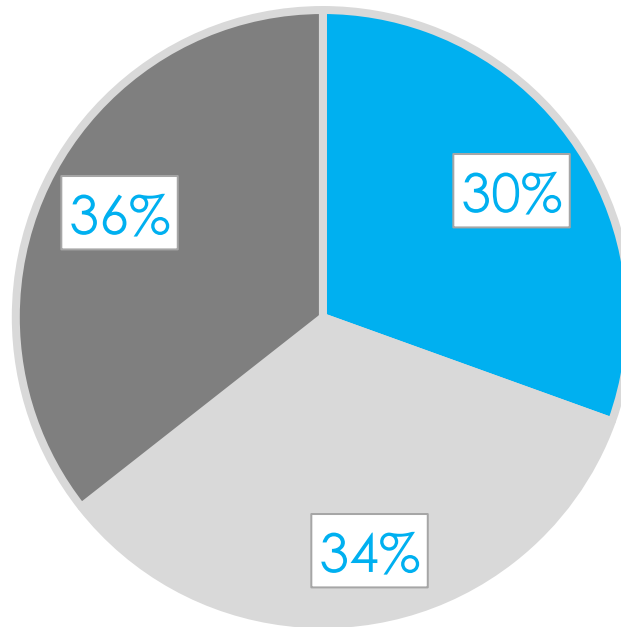
Management Reporting / Business Value

Does your agency have a business case process?
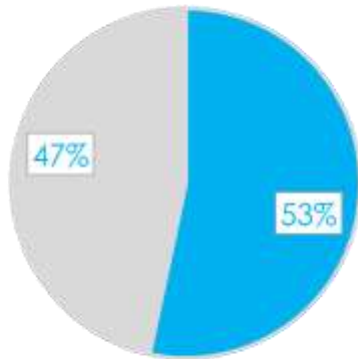
■Yes ■No

Does your agency have a management dashboard?
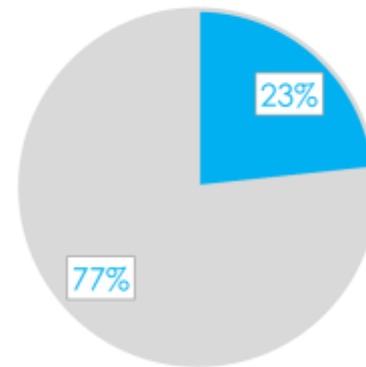
■Yes ■No

Do you have a business case model to evaluate ROI/benefits?
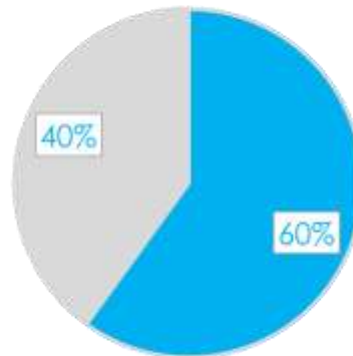
■Yes ■No

Process Selection, Use Case, Automation Sharing

Has your agency addressed process selection?

35%

65%
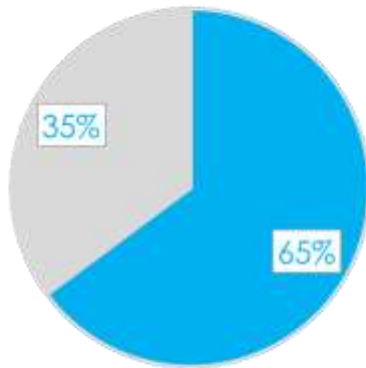
- Yes No

Has your agency addressed process prioritization?

38%

62%
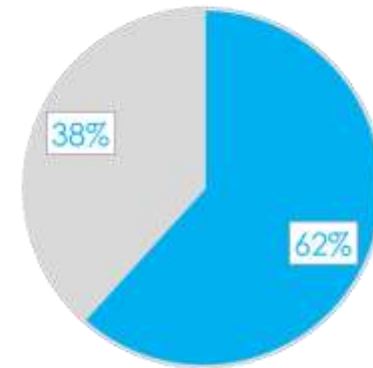
- Yes No

Has your agency addressed the sharing of automations?

27%

73%
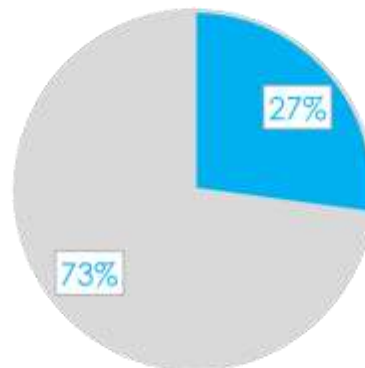
- Yes No

Governance / Center of Excellence (CoE)

Survey results based on 59 responses from 45 different agencies/offices

Has your agency begun to address governance?

- Yes
- No
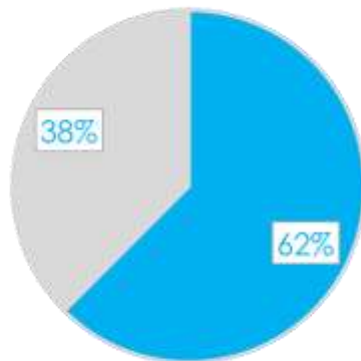
Does your agency have an established PMO/COE?
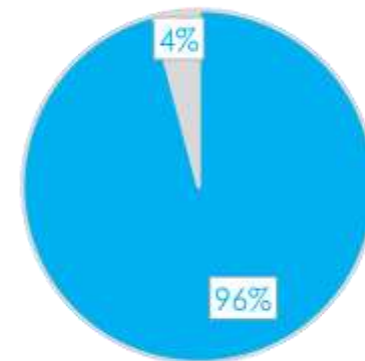
- Yes
- No

Do you have a documented implementation process?
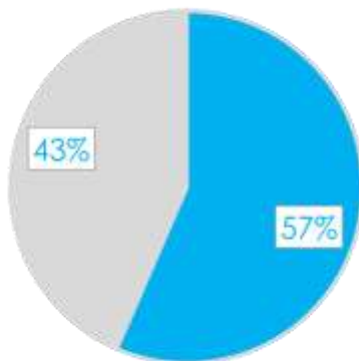
- Yes
- No

Have you taken steps to make your program audit ready?
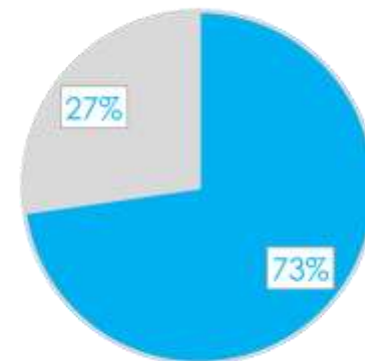
- Yes
- No

IT Platform, Security/ATO, Credentialing

IT Platform
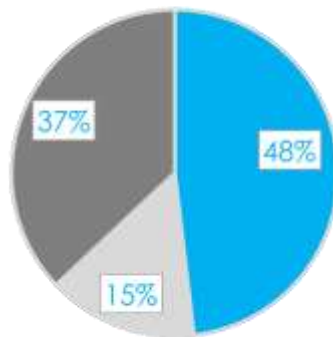
- 48% Attended
- 15% Unattended
- 37% Mix

Separate Dev/Test Environment
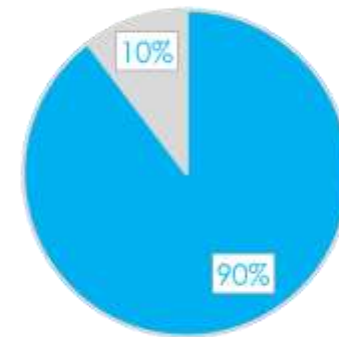
- 90% Separate
- 10% Combined

Security Approval
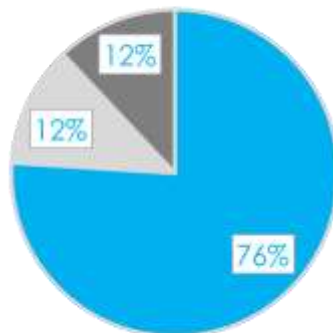
- 76% Approved Separately
- 12% White Listed Systems
- 12% Other

Credentialing
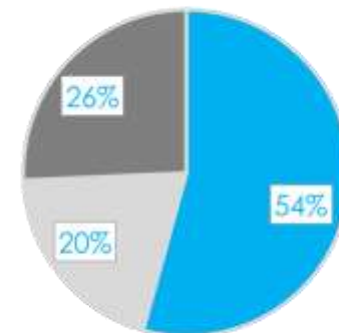
- 54% Human Users Credentials
- 20% Bots Credentials
- 26% Combination

Development

Automation Development Process

- 13%
- 26%
- 61%

Legend: ■ Agile ▢ SDLC ■ Combination
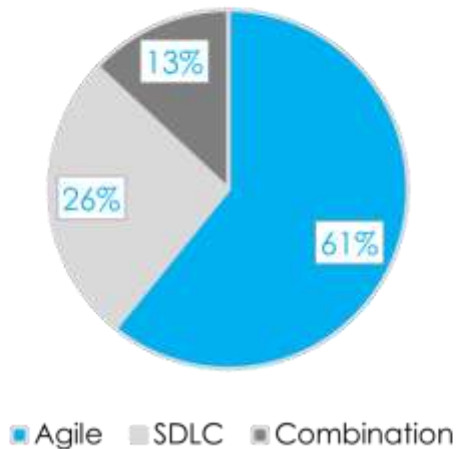
Average # of Development FTE Per RPA Program

5.3

Where is development done?

- 32%
- 48%
- 20%

Legend: ■ In House ▢ Contractors ■ Combination

Where is development done?

- 41%
- 38%
- 21%

Legend: ■ Business Staff ▨ IT Staff ■ Contractors
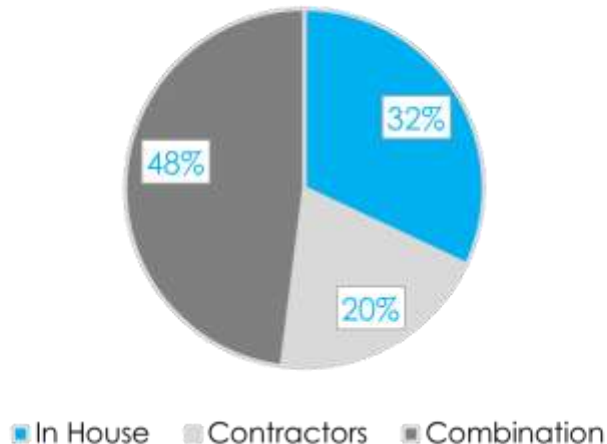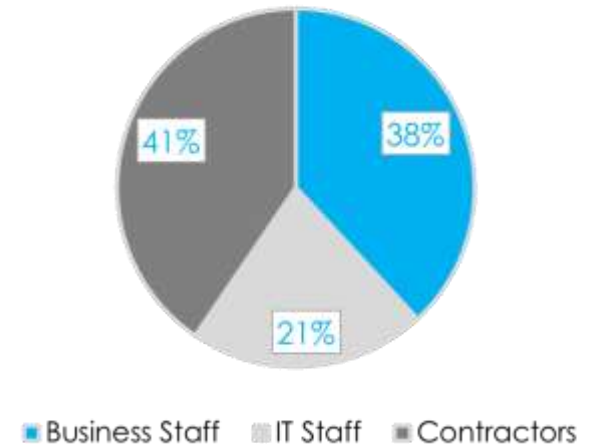
Privacy

Survey results based on 59 responses from 45 different agencies/offices

Do you consider privacy requirements before automating?

19%

81%

■ Yes ■ No

Operations Management

Has your agency addressed performance monitoring?

44%

56%
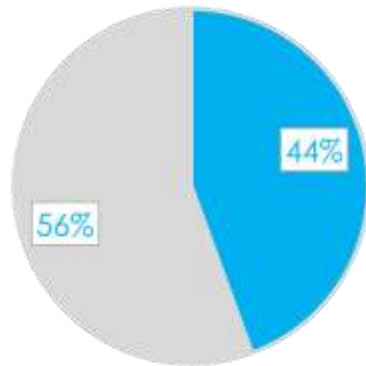
Yes   No

Has your agency addressed change control?

22%

78%
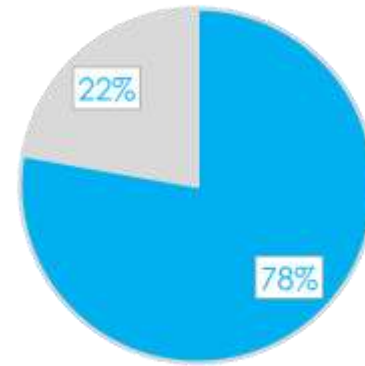
Yes   No

Has your agency addressed operations & maintenance?

22%

78%
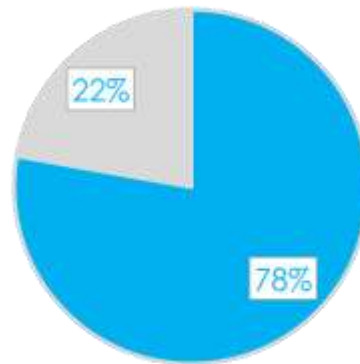
Yes   No

HR, Culture, Comms, and Change Manag.

Has your agency addressed HR impacts?

22%

78%
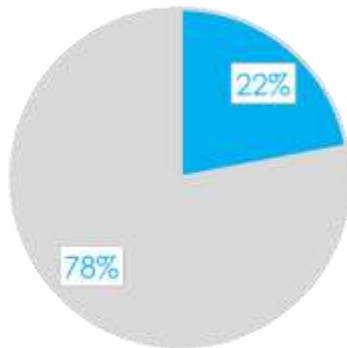
Yes No

Have you begun to reskill or upskill impacted employees?

25%

75%
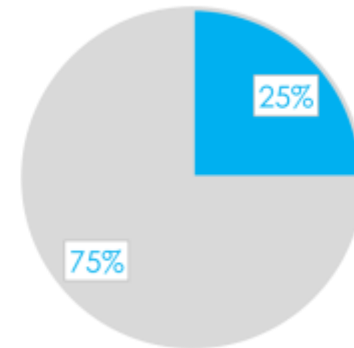
Yes No

Would an inter-agency development academy be helpful?

17%

83%
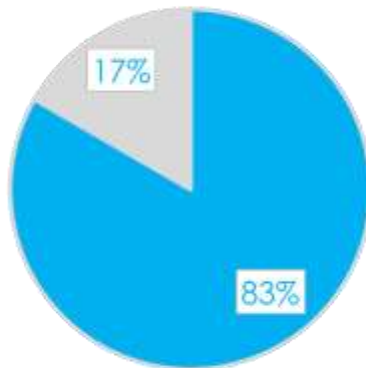
Yes No

Have you championed RPA in your agency?

19%

81%

Yes No

Contracting

Has your agency addressed the RPA contracting process?

45%

55%
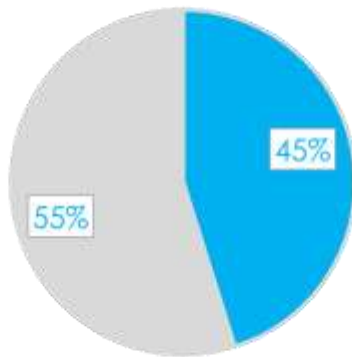
■ Yes ■ No

Could your agency leverage a GWAC RPA bot IDIQ?

31%

69%
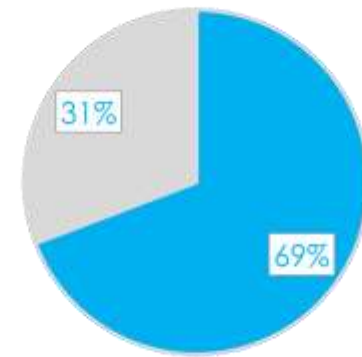
■ Yes ■ No

Does your contract include training current employees to develop bots?

46%

54%
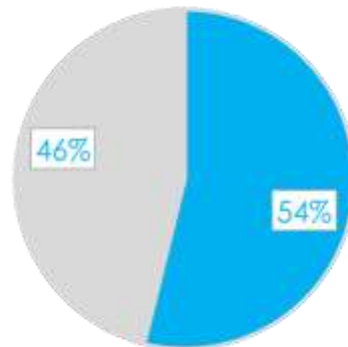
■ Yes ■ No

RPA to Intelligent Automation

Have you begun intelligent automation?

14%

86%
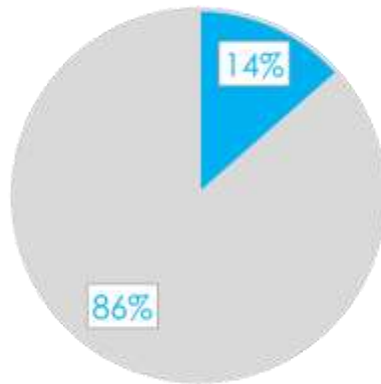
Yes No

Have you combined RPA with intelligent automation?

29%

71%
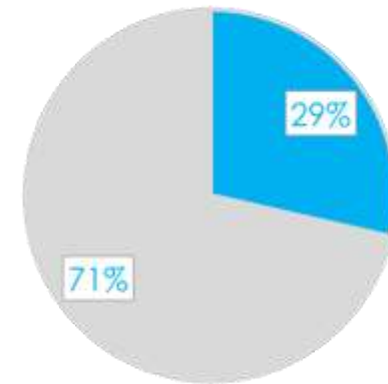
Yes No

What intelligent automation technologies would be beneficial to you?

13%

34%

20%

33%
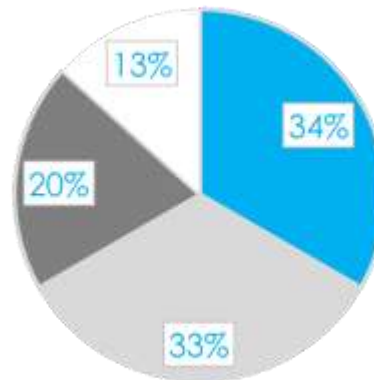
Machine Learning   Chat Bots   Natural Language Processing   Image Recognition

Collaboration Platform Demo: SAGE

11:45-11:50 AM

Closing Remarks

11:50-12:00 PM

🖨 **Print**

Hello everyone:

This is an "In Search of" Request for **Automation Sharing for Invoicing – FedEx or UPS.**
Please share any information you may have on RPA you are using associated with your invoicing process for either FedEx or UPS

Please respond to me bo.shevchik@stls.frb.org and or the LISTSRV FEDRPA@listserv.gsa.gov .

Respectfully,

Bo Shevchik, CGFM, PMP
Federal RPA CoP
Co-Lead Automation Sharing Practice Area

Outreach and Marketing Strategy
Invoice Processing Platform (IPP)
www.IPP.gov

Federal Reserve System
241 18th Street S, Suite 510
Arlington, VA 22202
(202) 759-0696 Office
(b) (6) ██████████
bo.shevchik@stls.frb.org

🖨 **Print**

Any digital content managers looking to grow your career? The U.S. Department of Commerce, International Trade Administration is hiring! https://www.usajobs.gov/GetJob/ViewDetails/547471800

For someone with a strong attention to detail who loves the challenge of a fast-paced, innovative environment and is passionate about creating transformative digital experiences, this is the opportunity.

This content leader will be responsible for leading and matrix-managing the organization's digital content execution across a new best-in-class digital platform, and the success of their leadership will have a positive impact toward the agency's mission and contribute to the economic prosperity of the U.S. economy.

We are looking for 1 outstanding candidate to fill this position. Please pass on to anyone who may be interested!

Blanche Ziv
Digital Strategy & Engagement
U.S. Department of Commerce | International Trade Administration

TSi TECHNOLOGY, SERVICES AND INNOVATION

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🖨 **Print**

Hi RPA COP,

Join the Multilingual COP on **Tuesday, October 15, 11:00 AM – 12:00 PM ET** to learn about a type of Artificial Intelligence (AI) technology, called Neural Machine Translation (NMT), that is quickly earning the attention of multilingual communities. This software is helping to expedite the translation process and has the potential to open government information to more non-English languages.

In this session, we will give a high-level overview of machine translation technology. We will discuss the evolution of machine translation (MT), how MT is used in the government, ways to "specialize" a language engine to a specific domain, calculation of return on investment (ROI), and the road ahead.

Register: http://go.usa.gov/xVeJN

--

DigitalGov University
digitalgovu@gsa.gov
https://digital.gov/events/

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🖶 **Print**

Federal Community of Practice Members,

Please virtually join the Community from 11:30 to 12:30 next Friday, 10/25. During the meeting, we will give a brief update on the playbook, and then DOD OSD RPA Program Leader Erica Thomas will lead a discussion on how agencies can pick the best processes for RPA and build a robust development pipeline. This meeting will be an interactive session to provide practical insights designed to optimize your RPA program.

To register, please click the following link below:
https://www.eventbrite.com/e/robotic-process-automation-community-of-practice-meeting-registration-77041548345

For members who cannot access Zoom, we will send out the slides prior to the event for your viewing during the event!

Regards,
Nick Surkamp

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🖨 **Print**

Dear RPA COP,

On behalf of the Federal CIO Council, the Office of American Innovation and the Technology Transformation Service at GSA, we're pleased to invite you to the inaugural **Federal Artificial Intelligence Community of Practice meeting on October 31, 2019 from 10 am to noon EST**. We know that many RPA practitioners are also interested in broader AI implementation.

The purpose of the federal Artificial Intelligence Community of Practice (AICOP) is to accelerate, support and coordinate the use of artificial intelligence (AI) technologies in Federal agencies, including those related to autonomous systems, biometric identification, computer vision, human-computer interactions, machine learning, natural language processing, and robotics.

This kick-off meeting will introduce the AICOP, review the charter, discuss a new AI Playbook, as well as share and learn presentations by federal AI practitioners.

The AICOP is co-sponsored by the GSA Technology Transformation Service and the Federal Chief Information Officer. It is open to all federal employees.

When:
Thursday, October 31, 2019
10:00 AM – 12:00 PM EST

Where:
US General Services Administration
1800 F St NW, Room 1425
Washington, DC 20006

Spaces are limited for this in-person meeting. Please REGISTER HERE. We look forward to seeing you!

Best regards,

Steven Babitch
AI Solutions Lead
GSA | Technology Transformation Service
steven.babitch@gsa.gov

Gwynne Kostin
Sr. Advisor and Director of Special Projects

GSA | Technology Transformation Service

gwynne.kostin@gsa.gov

U.S. General Services Administration

1800 F Street, NW

Washington, DC 20405

--

DigitalGov University
digitalgovu@gsa.gov
https://digital.gov/events/

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🖨 **Print**

Federal Community of Practice Members,

The Federal Robotic Process Automation (RPA) Community of Practice is excited to announce its upcoming workshop - Leveraging Robotic Process Automation (RPA) to Transform Federal Finance - to be held on November 1, 2019 at 1800 F Street, NW, Washington D.C.

The workshop will provide attendees with use cases and tools from current Federal Finance leaders who are using RPA to transform their financial operations, reporting, and controls. The workshop will include small group discussion and collaboration to identify applications that can be easily implemented at their agency.

The session is limited to the first 80 registrants. Please use the following link for registration.

Regards,
Nick

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Federal RPA Community of Practice (COP)

2019

Leveraging RPA to Transform Federal Finance

November 1, 2019

- Sponsored by the Federal RPA Community of Practice

A HANDS-ON WORKSHOP FOR FEDERAL FINANCE LEADERS LOOKING TO IDENTIFY RPA APPLICATIONS THAT CAN BE EASILY IMPLEMENTED AT THEIR AGENCY

Robotics Process Automation (RPA) is quickly becoming a critical component of Federal strategy to automate manual, high output tasks. Come learn from Federal leaders currently using RPA about how your agency can adopt this technology and transform financial operations, reporting, and controls.

1800 F Street, NW, Washington D.C.
Room 1153 from 8:30 AM - 12:30 PM

🖨 **Print**

Hi Nick,

I hope you are well.

I can't access Zoom at the Pentagon. Please send me the slides.

Thanks,

Gloria Steremberg
Fraud Risk & Data Analytics (FRDA) Branch Head
Office of Internal Controls & Compliance Division
Department of the Navy IOASN (FM&C)IFMO
Phone PNT: 703.692.1470
Cell Phone: 571.214.2388
Email: gloria.steremberg@navy.mil

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Nicholas Surkamp - BR-C
Sent: Tuesday, October 22, 2019 7:23 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [Non-DoD Source] [FEDRPA] REMINDER: Community of Practice Meeting - 10/25 - ALL VIRTUAL

Federal Community of Practice Members,

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Looking forward to an engaging conversation!

Regards,
Nick

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Robotic Process Automation

Federal Community of Practice (CoP)

Realizing the Promise of RPA to Transform Government

October 25th, 2019
11:30am - 12:30pm

Agenda

11:30-11:35 AM – **Welcoming Remarks:** Gerard Badorrek, General Services Administration (GSA)

11:35-11:40 AM – **Playbook Update:** Jim Geoghegan, General Services Administration (GSA)

11:40-12:25 AM – **Process Selection Discussion:** (b) (7)(C) ████████, Office of the Secretary of Defense (DOD) ; Brian Mooers (GSA)

12:25-12:30 AM – **Closing Remarks and Upcoming Events:** Nick Surkamp, General Services Administration (GSA)

Welcoming Remarks

11:30-11:35 AM

Playbook Update

11:35-11:40 AM

Playbook Update

- GSA is working to consolidate and edit the drafted playbook chapters.

- To help with navigation, flow, and consistency we're incorporating additional structure to align content to the maturity model.

- Version 2.0 will be distributed to CoP leaders for comment.

- Next up: Design for Digital.gov

Playbook Update

RPA Playbook - Proposed Topic Alignment

Process Identification and Selection

11:40-12:25 AM

Process Identification and Selection

- **Identifying Automation Opportunities**
  - Roadshows
  - Identify the right person – treasure trove of ideas
  - Automation workshops with process owners (John Felstead (DLA))
  - Intake [questionnaires](#)
  - Beg, borrow, and steal ideas from like organizations

- **Scoring and Prioritizing Automation Opportunities**
  - Common Criteria
  - Other criteria for consideration
  - Sharing Lessons Learned/Exception. Examples
    - o Automation you've discarded or an automation you wish you had discarded?
    - o Automations that have gone forward despite scoring poorly?

Sales and Marketing: Customer Archetypes

		Low	High
RPA Interest and Knowledge	**High**	**On the Fence** A more in depth workshop will build trust, enthusiasm, and even build an initial list of automations and expected benefits.	**Champions** Champions believe in RPA and may already know what they want. Target them for early wins and quick development.
	Low	**Resistors** Getting to the "right person" who has connections and established trust will help. Executives may be able to create connections.	**Future Champions** While this quadrant is diminishing based on the enthusiasm surrounding RPA, additional education and marketing can help these individuals realize the potential of RPA. RPA opportunity assessments work well with this group

Trust in RPA Technology

Identifying Automation Opportunities

Manual
- Highly Manual
- Substantial Keyboard Activity
- Multiple Mouse Clicks
- Data Entry Errors

Volume
- High Volume
- Numerous Data Elements
- Supplemental Content
- Susceptible to Legibility Interpretation & Transposition Challenges
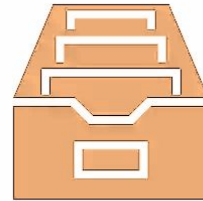
Process
- Mature Process
- Standardized & Institutionalized Procedures
- Well Documented Procedures
- Rules Based
- Stable "Input"
- "Validatable" Output

Repetitive
- Highly Repetitive
- Productivity Impediment
- Monotonous
- Batched Processes

Resources
- Large Resource Commitment
- Task Focused
- Limited Variation
- "Stove Pipe" Resources

Tools to Consider

- Roadshows
- Identify the right person – treasure trove of ideas
- Automation workshops (with process owners)
- Intake questionnaires
- Beg, borrow, and steal ideas from like organizations

Sample Intake Questionnaires and Assessment Frameworks

Identifying Automation Opportunities

RPAs perform as designed, every time (eliminates defects)--error proofing →

Speed up approval times--eliminates or reduces wait times →

Eliminate repetitive, rules/procedure based processes allowing focus on more complex, value add activities →

RPA performs all keystrokes a human does...but faster and more precise →

	Waste	Definition	Examples
D	**Defects**	Information, products and services that are incomplete or inaccurate	- Inaccurate applications - Missing Data - Missed deadlines
O	**Overproduction**	Making more of something - making it earlier or faster- than it's needed	- Extra copies of reports - Redundant storage (hard & soft) - "Reply All" on emails
W	**Waiting**	Waiting for information, equipment, materials, parts or people	- Waiting for approvals - Waiting for equipment - Waiting for large batches
N	**Non-Utilized Talent**	Not properly utilizing people's experience, skills, knowledge or creativity	- Employees unable to make decisions - Employees not fully trained - Skilled employees doing unskilled tasks
T	**Transportation**	Unnecessary movement of materials, information or equipment	- Hand-offs between functions - Multiple reviews - Sending, resending emails
I	**Inventory**	Accumulation of parts, information, applications, etc. beyond what is required by the customer	- Stockpiling supplies - Information piling up for data entry - Keeping data longer than necessary
M	**Motion**	Any movement by people that is not of value to the customer	- Repetitive keystrokes - Walking between equipment - Switching applications
E	**Extra- Processing**	Any steps that do not add value in the eyes of the customer	- Extra formatting, extra fields - Extra features, excess detail - Extra report information

Robotic Process Automation Workshop Overview

(b) (7)(C)

October 25, 2019

Purpose:

- RPA Understanding – Automation workshop will frame the RPA technology and increase business understanding.
- Engagement – Establish expectations for collaboration between RPA team and the business community.
- Use Case Identification – Work with users to document and assess new use cases for submission

Audience

- Coordinate with the Process Owners and SPOs to include the appropriate BPAs / MSC SMEs to attend each session.

Overview (See Right):

- Workshops are designed to be a one day in-person (preferable) session
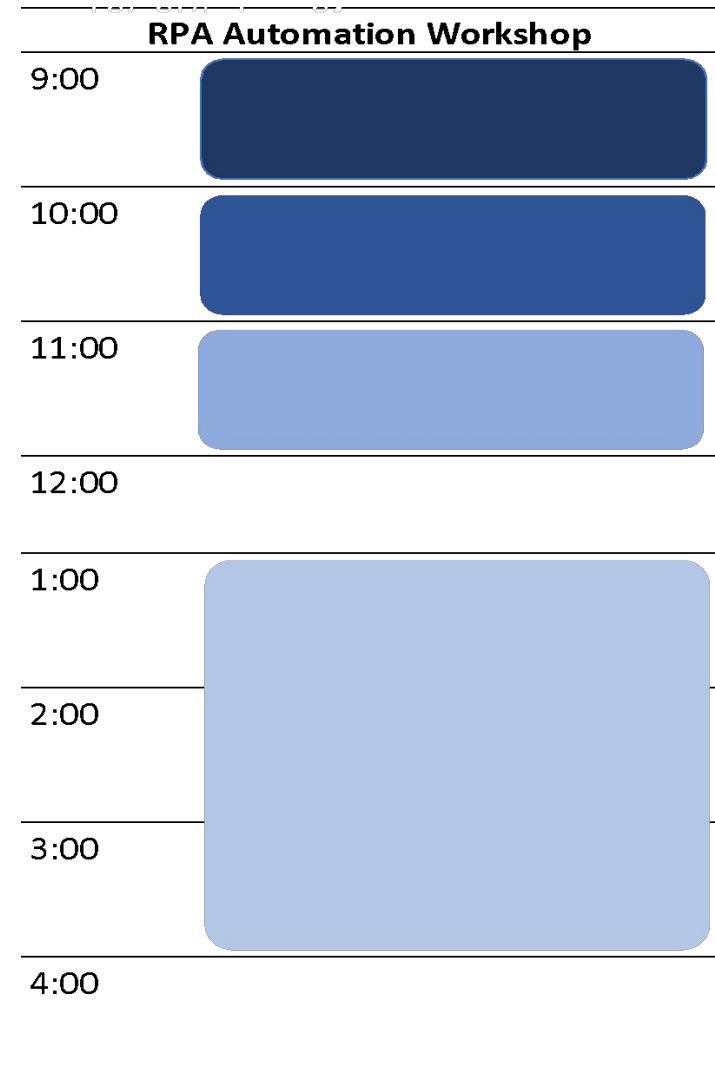
RPA Automation Workshop

Time	
9:00	
10:00	
11:00	
12:00	
1:00	
2:00	
3:00	
4:00	
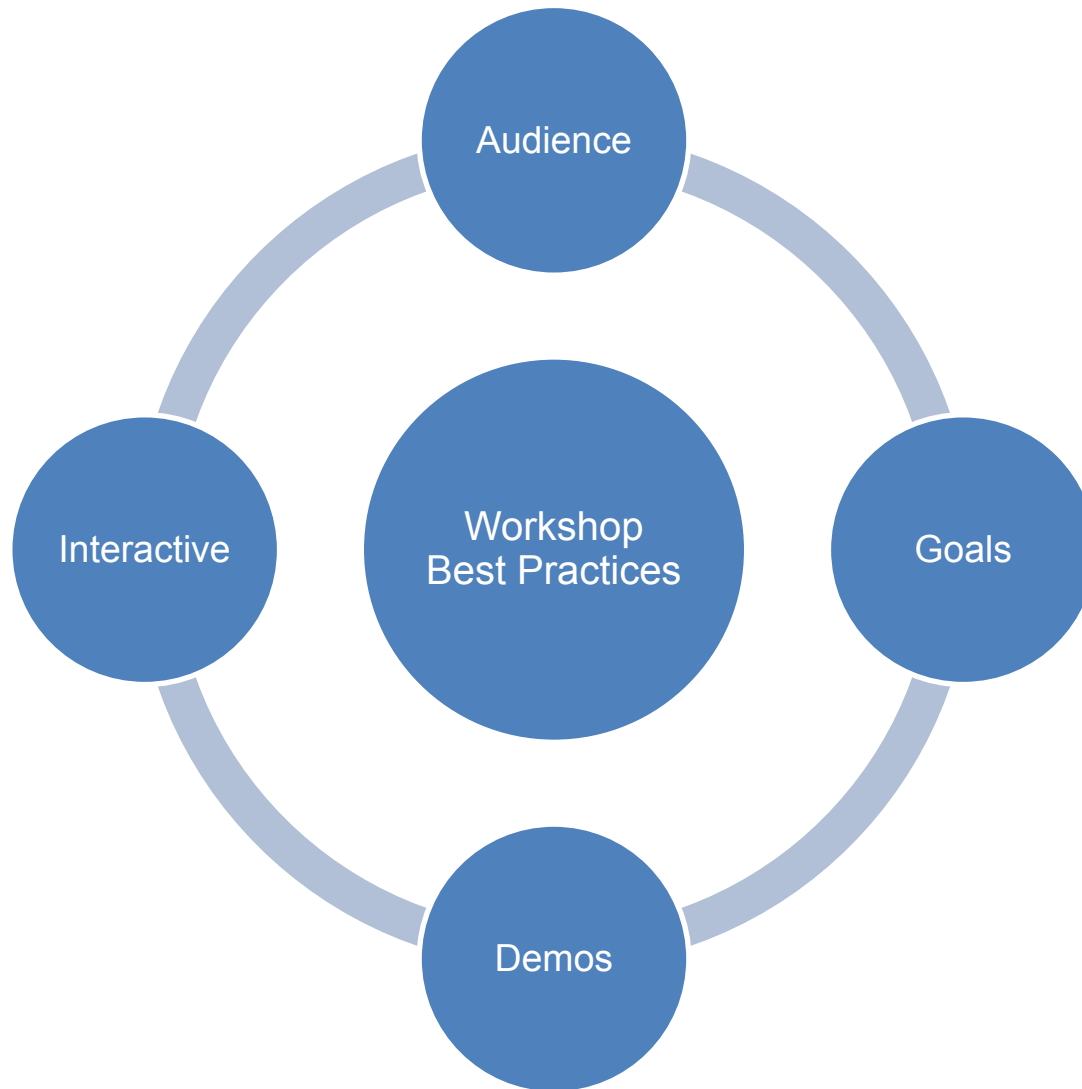
Scoring and Prioritizing Automation Opportunities

Criteria	Description	Evaluation Factors	
Suitability	Measures potential constraints or benefits to the process	● Repetitiveness of Process ● Frequency ● Exception Handling ● Structure and/or Sensitivity of Data	● System and Process Stability ● Rules-Based / Standardization of Processes
Complexity	Measures how complex a solution would be required to accomodate the process	● Number of Locations ● Quality of Process Documentation ● Number of Systems/Applications ● Type of Connectivity ● Number of Screens ● Number of Key Stroke Steps	● Operational Readiness ● SME Availability ● System or Data Accessibility ● Number of Decision Trees or Branching Decision Points
Value	Quantifies the savings from the automation (benefits can be quantitative and/or quantitative)	● Strategic/Leadership Priorities ● Number of Full-Time Equivalents Working on Process ● Average Time Spent on Process (Labor Hours) ● Length of Time Automation is Estimated to be Leveraged ● Enterprise Applicability/ Scalability	● Control Value ● Human Error Reduction ● Cycle-Time Reduction ● Estimated Cost to Design and Deploy the Automation ● Enhanced Auditability or Audit Readiness ● Improved Performance Metrics (Other)

Other Factors for Consideration:

1. Strategic Priority Designation
2. Improved Auditability or Audit Readiness

Closing Remarks

11:55 AM-12:00 PM

Closing Remarks and Upcoming Events

- BOTs Forum 10/31 event at the Renaissance DC sponsored by ACT-IAC

- Finance Functional Workshop 11/1 at GSA HQ (Open to 2-3 individuals per agency)

- Future Functional RPA Events (CHCOs, Procurement, IT, etc.)

WorkSheet
Process Questionnaire

Document Overview
Description & Instructions
This worksheet aims to extract high level information about the business process in order to assess the opportunity for automation.

Please attempt to answer all questions, providing as much detail as possible.

Questions range across four broad areas:
-Potential (Indicates the potential FTE Saving within a Business Unit)
-Complexity (Impacts the ability to maximize the potential FTE saving, whilst affecting Design & Build times)
-Scope (Impacts the ability to maximize the potential FTE saving, whilst affecting Design & Build times)
-Governance (Impacts the ability to maximize the potential FTE saving, whilst affecting Design & Build times)
A process questionnaire should be completed for each Level 2 process under investigation (end to end processes completed by a team within a function/business area)

Questions	Sample Completed Questionnaire
General	
1 **Organization name**	Washington Headquarters Service
2 **Organization Symbol**	WHS
3 **Department/Office/Directorate**	Acquisition Directorate (AD)
4 **Process name**	**WHS/AD SharePoint to RMA Document Transfer**
5 **Process Description**	Move final contract documents from SharePoint document library to Records Management Application (RMA)
6 **Process Owner (Name, Title / Role)**	**John Smith, Contracts Specialist**
7 **Process Owner Email**	john.smith.civ@mail.mil
8 **Process Owner Phone Number**	123-456-7890
Process Metrics Inputs	
9 **Please list the number of employees who currently complete the process, their rank, and the average number of hours they spend on it monthly.**	20 employees - GS13-GS14 20 hours monthly (per employee)
10 **What is the frequency of the process?** e.g., Daily, weekly, monthly, quarterly, as needed	Multiple Times Per Day
11 **How many times is the process completed at the interval above?** e.g., 3 times per quarter, 2 times per day, etc.	Up to 10 times a day Volume increases at FY end (August, September, October) due to significant spike in volume of completed actions
12 **What is the average handling time per case for the process (please note if response is in minutes or hours)?** e.g., 5 minutes to complete the process end to end	10-45 mins...depends on number of documents and complexity of contract/order/mod
13 **Is this process expected to change or become obsolete within the next year?**	The organization is not considering upgrading or switching systems and this process will be required long term.
14 **Is this a highly error prone process?** e.g., Errors are frequently made that lead to a large amount of rework.	Yes. Data entry errors are prominent. We are masking the fields in the RMA to mitigate this issue. We cannot, however, do the same in SharePoint so we will have to work that issue.
15 **Is reducing the handling time per case of the process a key goal from automation?**	Yes.
16 **What are the key benefits expected from automation?**	Increased Quality and Compliance
Process Definition & Requirements (Inputs & Outputs)	
17 **How complex is the process?**	The process follows simple business rules, but involves a diverse number of transactions.
18 **What format is the data in? (scanned documents, website, excel, email, etc.)**	Many forms - PDF, Word, Excel, PPT, Images, CAD, Access DB
19 **How much of the process is standardized?**	Some cases can be handled by a standardized set of rules, but some require human judgement
20 **To what extent is process documentation available?** e.g., documented process flow, training documents, templates of inputs and outputs	No material process documentation exists. A Business Process Walkthrough is required in order that a Refined Process Assessment can be produced.
21 **At how many locations is the process performed?**	Process is executed at a single location.
22 **Please provide a description of the key steps required to complete the process to be automated, to include inputs, transactions, hand-offs, and outputs.** For example: 1. Receives excel file 2. Enters data to database 3. Inputs payment details to webpage 4. Sends confirmation email	1. Retrieve email 2. Scrape information from email 3. Go to SharePoint folder 4. Move/copy files into termporated shared drive and close Explorer view of SharePoint 5. Open HPE Client from desktop 6. Search HPE Client for contract 7. If not found, create new contract 8. Input information based on email scraping 9. Move files to Contract tabs
23 **Are there any data limitations that can risk automation? If yes, please explain.** e.g., personal information, PII, CUI, FOUO etc.	No, We are working with Post Award data which means it's very close to being public.
Systems and Applications	
24 **Please name all systems, applications and environments touched by this process.**	SharePoint 2013 (SharePoint) HPE Records Manager 9.2 (RMA) Microsoft Outlook
25 **Are there systems involved in the process that will be upgraded within next 6 months to a year?**	Not likely
26 **How are the applications / systems accessed?** e.g., VPN, Citrix, Web, etc.	SharePoint and RMA are accessible via both VPN and Citrix.
27 **How are systems logged in to (CAC, UserID/password)?**	SharePoint - Government CAC Enabled HPE Records Manger (RMA) - Windows Authentication Email - Government CAC Enabled
28 **Additional Notes or Comments**	

The Intelligence Community's environment for unclassified collaboration and outreach.

SAGE REGISTRATION FORM

Full Name   Your Agency/Organization

Sponsoring Organization/Affiliation   U.S. Citizen

                                                  Yes
                                                  No

Registration Type   Citizenship (Non-US)

Unclassified E-Mail Address   Unclassified Phone Number

                                             Clearance?

                                                  Yes
                                                  No

Please indicate the name of the Sage space you are requesting access to.

(All requests will be screened through the Sage space owner.)
The completed information above is required to obtain a Sage Account.

If the submit button is not functioning, please save the completed
form and e-mail it to newuser@sagecollaboration.com.

🖨 **Print**

I have registered, but don't have a link to the zoom. Can you send me one?

Kevin Larsen, MD, FACP
Director, Continuous Improvement and Strategic Planning
Office of the Chief Operating Officer
Centers for Medicare and Medicaid Services
7500 Security Blvd
Baltimore MD 21244-1850
443-938-3393

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Nicholas Surkamp - BR-C
Sent: Friday, October 25, 2019 8:25 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [FEDRPA] Slides for 10/25 Community Meeting

Good Morning, Federal COP Members!

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🖶 **Print**

I too am having the same problem.

Respectfully,
Kayleen

If you have any questions please feel free to contact me

Kayleen M. Huggart | Cell: (b) (6) ████████ *(New Number)*
Senior Contracting Officer, Level III Certified
Telecom Services Contract Operations Div G Branch C (QT2A1GC)
Office of Information Technology Category (ITC)
Federal Acquisition Service (FAS)
U.S. General Services Administration (GSA)

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> I have registered, but don't have a link to the zoom. Can you send me one?
>
> Kevin Larsen, MD, FACP
>
> Director, Continuous Improvement and Strategic Planning
>
> Office of the Chief Operating Officer
>
> Centers for Medicare and Medicaid Services
>
> 7500 Security Blvd
>
> Baltimore MD 21244-1850
>
> 443-938-3393
>
> **From:** Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Nicholas Surkamp - BR-C
> **Sent:** Friday, October 25, 2019 8:25 AM
> **To:** FEDRPA@LISTSERV.GSA.GOV
> **Subject:** [FEDRPA] Slides for 10/25 Community Meeting
>
> Good Morning, Federal COP Members!
>
> I hope that everybody is looking forward to the community-wide meeting today to get an update on the playbook and to then go through some of the hurdles surrounding candidate identification, process selection and process optimization.

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https://www.eventbrite.com/e/robotic-process-automation-community-of-practice-meeting-registration-77041548345

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Nick

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🖨 **Print**

Join Zoom Meeting
https://zoom.us/j/230979159

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Larsen, Kevin L. (CMS/CISP)
Sent: Friday, October 25, 2019 10:20 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [EXTERNAL] Re: [FEDRPA] Slides for 10/25 Community Meeting

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Meeting ID: (b) (6) ███████

One tap mobile

(b) (6)
███████████████████

To unmute and mute yourself when dialing in by phone, dial Star (*) 6.

Justin C. Borsheim | OCFO Financial Systems Manager
Western Area Power Administration | Headquarters
(O) 720.962.7464

From: Federal Robotic Process Automation [mailto:FEDRPA@LISTSERV.GSA.GOV] **On Behalf Of** Kayleen Huggart - QT2A1GC
Sent: Friday, October 25, 2019 9:33 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [EXTERNAL] Re: [FEDRPA] Slides for 10/25 Community Meeting

I too am having the same problem.

Respectfully,
Kayleen

If you have any questions please feel free to contact me

Kayleen M. Huggart | Cell: (b) (6) ███████ *(New Number)*
Senior Contracting Officer, Level III Certified
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Senior Contracting Officer, Level III Certified
Telecom Services Contract Operations Div G Branch C (QT2A1GC)
Office of Information Technology Category (ITC)
Federal Acquisition Service (FAS)
U.S. General Services Administration (GSA)

On Fri, Oct 25, 2019 at 8:51 AM Borsheim, Justin <000005f52c08190c-dmarc-request@listserv.gsa.gov> wrote:

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Western Area Power Administration | Headquarters

(O) 720.962.7464

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Huggart - QT2A1GC
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Federal Community of Practice Members,

As we discussed today, the Federal Robotic Process Automation (RPA) Community of Practice is excited to announce its upcoming workshop - Leveraging Robotic Process Automation (RPA) to Transform Federal Finance - to be held on November 1, 2019 at 1800 F Street, NW, Washington D.C.

The workshop will provide attendees with use cases and tools from current Federal Finance leaders who are using RPA to transform their financial operations, reporting, and controls. The workshop will include small group discussion and collaboration to identify applications that can be easily implemented at their agency.

The session is limited to the first 80 registrants. Please use the following link for registration.

Regards,
Nick

🖶 **Print**

Good Afternoon RPA Community Members,

A couple of months ago, a quick skim of Challenge.gov would have revealed a novel listing.

With no winners or prizes promised, the Federal Risk and Authorization Management Program (FedRAMP), housed at the General Services Administration, asked the public to suggest new approaches to the FedRAMP Authorization Process for cloud products and its supporting functions.

Focusing on key areas including time, cost, reciprocity and awareness, the FedRAMP Ideation Challenge invited feedback directly from agencies and industry, with a focus on the cybersecurity community.

And for those who believe you need a prize to elevate awareness, this initiative generated a strong response, with its ideation video streamed over 500 times and more than 70 qualified submissions now in evaluation.

Find out how they did it: Tune in at 2 p.m. ET, Wednesday, Oct. 30, for the **Federal Crowdsourcing Webinar Series: Episode 6** on the FedRAMP Ideation Challenge. Betsy Steele, who leads the FedRAMP Program Office's outreach and training initiatives, will discuss the initiative and how it will help power the next iteration of the FedRAMP program.

The webinar series illuminates how U.S. agencies are reaching beyond their walls to source talent and enthusiasm, and multiplying the ideas and perspectives being brought to a particular issue.

Hope you can join us for this upcoming talk!

--

DigitalGov University
digitalgovu@gsa.gov
https://digital.gov/events/

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Please send all communications – to include any ServiceNow® Ticket Number(s) – to the Department of Justice Team at DOJ.Team@usda.gov.
For all you do every day, thank you.
V/r,
t

_____

TERRY PEOPLES, M.Ed., sHRBP, ATM, FAC COR | PROGRAM ANALYST
CLIENT MANAGEMENT BRANCH (CMB)
CLIENT SERVICES DIRECTORATE | GOVERNMENT EMPLOYEES SERVICES DIVISION
USDA | OCFO | NATIONAL FINANCE CENTER
13800 OLD GENTILLY ROAD | NEW ORLEANS, LA 70129 | (504) 426-7936 (OFFICE) | (303) 274-3821 (FAX)

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"...economic opportunity through innovation."
http://www.usda.gov/

From: Federal Robotic Process Automation [mailto:FEDRPA@LISTSERV.GSA.GOV] **On Behalf Of** Nicholas Surkamp - BR-C
Sent: Tuesday, October 22, 2019 6:23 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [FEDRPA] REMINDER: Community of Practice Meeting - 10/25 - ALL VIRTUAL

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Good afternoon,

I am on the project management team for CBP's Strategic Transformation Office (STO) and am assisting in implementing RPA initiatives within CBP. I was on vacation last week, and missed this valuable meeting and slides. Would it be possible to get a copy of them?

(b) (7)(C)

Management Analyst
Strategic Transformation Office (STO)
Office of Human Resources Management
U.S. Customs and Border Protection
Mail to: (b) (7)(C) @cbp.dhs.gov

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Peoples, Terry - OCFO
Sent: Monday, October 28, 2019 2:18 PM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: Re: [FEDRPA] REMINDER: Community of Practice Meeting - 10/25 - ALL VIRTUAL

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🖶 **Print**

RPA COP,

Join us **Monday, November 18, 2019 10:00 AM – 12:00 PM ET** with IT Modernization Centers of Excellence Director of Workforce Solutions, Nina Bianchi, in this two-hour in-person workshop to explore trends and barriers in the federal workforce transformation. You will learn insights identified from over 80 human-centered management workshops that Nina has led in the federal government since joining as a Presidential Innovation Fellow in September 2017. This workshop will be interactive and include collaborative human-centered brainstorming activities to help drive solutions that grow lifelong learning in the government.

Let's imagine a future where the federal government is the employer of choice for the next generation of leaders.

Register here: http://go.usa.gov/xprGA

--

DigitalGov University
digitalgovu@gsa.gov
https://digital.gov/events/

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Hi,

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Vicki.

On Tue, Oct 22, 2019 at 6:47 AM Nicholas Surkamp - BR-C <nick.surkamp@gsa.gov> wrote:
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Henry Onuorah | Phone: 202-368-7320
Contract Specialist | Office of IT (Non-MAS) Acquisition Operations
Office of Information Technology Category (ITC)
Federal Acquisition Service (FAS)
U.S. General Services Administration (GSA)

ACQUISITION GATEWAY

On Wed, Oct 30, 2019 at 6:18 AM Forrest, Vicki <0000065a39510eca-dmarc-request@listserv.gsa.gov> wrote:

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Wanda L. Hein
Financial Management Specialist
Accounting and Financial Management Services
Corporation for National and Community Service
(202)606-6806 l Email: whein@cns.gov

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v/r
LaTonya Griffith
CNRMC IT Director

Sent with BlackBerry Work
(www.blackberry.com)

From: Henry Onuorah - QT2A1EA <henry.onuorah@GSA.GOV<mailto:henry.onuorah@GSA.GOV>>
Date: Wednesday, Oct 30, 2019, 7:38 AM
To: FEDRPA@LISTSERV.GSA.GOV <FEDRPA@LISTSERV.GSA.GOV<mailto:FEDRPA@LISTSERV.GSA.GOV>>
Subject: [Non-DoD Source] Re: [FEDRPA] [EXTERNAL] [FEDRPA] REMINDER: Community of Practice Meeting - 10/25 - ALL VIRTUAL

Hi,

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Henry Onuorah | Phone: 202-368-7320

Contract Specialist | Office of IT (Non-MAS) Acquisition Operations

Office of Information Technology Category (ITC)<http://www.gsa.gov/portal/content/105150>

Federal Acquisition Service (FAS)<http://www.gsa.gov/portal/content/105080>

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[https://lh6.googleusercontent.com/LQA1opKY5PtIKvRv5nj2wOSCXK0295h6YbQBl389OS6IUkHIoeeo6PdMRvW7Br6payvRsRv0cXIKTz71-usnlzSGMFyPe55XKKTI8eto8kx

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Kayleen

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--
Respectfully,
Kayleen

If you have any questions please feel free to contact me

_____

Kayleen M. Huggart | Cell: (b) (6) (New Number)
Senior Contracting Officer, Level III Certified
Telecom Services Contract Operations Div G Branch C (QT2A1GC)
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For all future inquiries, please reply directly to nick.surkamp@gsa.gov.

On Wed, Oct 30, 2019 at 8:41 AM Kayleen Huggart - QT2A1GC <kayleen.huggart@gsa.gov> wrote:
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Corporation for National and Community Service

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For all interested members:

Event: [RPA & AI Innovation Seminar](#) (Hosted by the Advanced Technology Academic Research Center (ATARC))

Date/Time: Thursday 11/21/19 from 8:30am-11:00am ET

Location: USAID 2PY Building, 8th Floor, 2733 Crystal Dr, Arlington, VA 22202 (No remote attendance will be available for this particular event.)

Description: As part of ATARC's AI Working Group Robotic Process Automation (RPA) Project Team, this series of industry engagements will enable attendees to hear capability presentations and marketplace trends from RPA and AI vendors, learn industry perspectives and best practices for RPA and AI exploration, adoption, and implementation in the public sector, and ask questions, network, and build collaborative industry-government partnerships in an intimate setting.

Cost: Free

Regards,

Nick

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Federal RPA Community of Practice Members,

Come join the RPA CoP in person or online to learn how to solve RPA's biggest technology challenges with an introduction to the **Federal RPA Playbook**. This community-wide meeting from 10:00 AM - 11:30 AM on 12/6 will feature an *expert panel and an interactive question and answer session*. In the meeting, we will take a deep dive into technology topics such as security, credentialing, IT platform, and privacy, to include key findings from the playbook.

What: *Introducing the RPA Playbook - Addressing Technology Challenges with Government Leaders*
When: *12/6 from 10:00 AM - 11:30 AM*
Where: *US General Services Administration, 1800 F St NW, Room 1425 or Virtual*
Who: *All Federal RPA CoP Member*
https://www.eventbrite.com/e/rpa-cop-meeting-introducing-the-rpa-playbook-addressing-technology-challenges-with-government-registration-83154867447

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Below are the details for joining remotely:

(b) (6)

Dial by your location

(b) (6)

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Robotic Process Automation

Federal Community of Practice (CoP)

Realizing the Promise of RPA to Transform Government

December 6th, 2019
10:00 AM - 11:30 AM

Agenda

10:00 AM -10:10 AM – **Welcoming Remarks:** Gerard Badorrek, General Services Administration (GSA)

10:10 AM -11:20 AM – **Technology Round Panel**
 Security - *Frank Greenwell (FRB)*
 Credentialing - *Dave Weekley (Treasury)*
 Privacy - *Marcela Souaya (GSA)*
 IT Platform - *Sonya Alvelo & Ron Woody (USDA),* (b) (7)(C) ▮▮▮▮▮▮▮▮ *(DHS)*

11:20 AM -11:30 AM – **Closing Remarks and Updates:** James Geoghegan, General Services Administration (GSA)

Welcoming Remarks

10:00 AM -10:10 AM

Welcoming Remarks

Gerard Badorrek

Chief Financial Officer
General Services Administration (GSA)

Gerard Badorrek

Gerard Badorrek is the Chief Financial Officer of the U.S. General Services Administration (GSA). As the senior financial executive at GSA, he is responsible for the management of its $25 billion budget and over 600 financial personnel at GSA's central office and across 11 regions. Mr. Badorrek oversees all financial functions and activities, including strategic planning, performance management, budgeting, accounting, analytics and reporting, financial operations and audits. He also serves as GSA's Performance Improvement Officer.

Prior to this role in federal government, Mr. Badorrek spent more than 25 years in the private sector. His expertise in financial management and business operations successfully drove organizational change and improved performance levels at both public and private companies. Mr. Badorrek was a Senior Vice President at Xerox Services, holding positions as a Managing Director and Chief Operating Officer(COO) of the State Government group. He had an extensive career with MCI Communications including roles as Vice President of Finance, Vice President of Business Operations, Executive Director of Corporate Business Analysis and Business Unit CFO and Controller with responsibilities for leading large organizations, building teams and solving complex operational and business problems. He also served as CFO and COO for several private technology companies.

Mr. Badorrek has an MBA degree from the Graduate School of Business at Stanford University, a Master's degree in Economics from Case Western Reserve University and Bachelor degree in Operations Research and Industrial Engineering at Cornell University.

Technology Round Panel

10:10 AM -11:20 AM

Director Operations Support Division Treasury (FIT)

Dave Weekley

Question:

OMB Memo M-19-17 states that "Agencies shall manage and identify lifecycle of devices, non-person entities (NPEs), and automated technologies such as RPA tools and AI, ensuring the digital identity is distinguishable, auditable, and consistently managed across the agency. Does this mean that we need to come up with an entirely new process to credential our NPEs?

Sr. Information Security Specialist
Federal Reserve Board of Governors (FRB)

Frank Greenwell

Question:

What are the unique risks associated with RPA that should be considered during a security authorization?

Information Technology Specialist
United States Department of Agriculture

Sonya Alvelo
Ron Woody

Question:

Why did USDA take the long path in setting up robotics on a server platform instead of a desktop deployment?

**Director
Operations
Support Division**
Treasury (FIT)

Dave Weekley

Question:

How did you work with system owners to provide your automations access to necessary systems?

Sr. Information Security Specialist
Federal Reserve Board of Governors (FRB)

Frank Greenwell

Question:

Is an Authority to Operate (ATO) determination necessary for every automation that is put into production?

Information Technology Specialist
United States Department of Agriculture

Sonya Alvelo
Ron Woody

Question:

What were some technology lessons learned getting your first bots into production?

Closing Remarks and Updates

11:20 AM -11:30 AM

Next Steps

- Playbook

- Functional Workshops (Procurement - 1/17, HR - TBD)

- RPA CoP Community-Wide Meeting (1/10)
  - Next CoP meeting will cover the Management section of the playbook
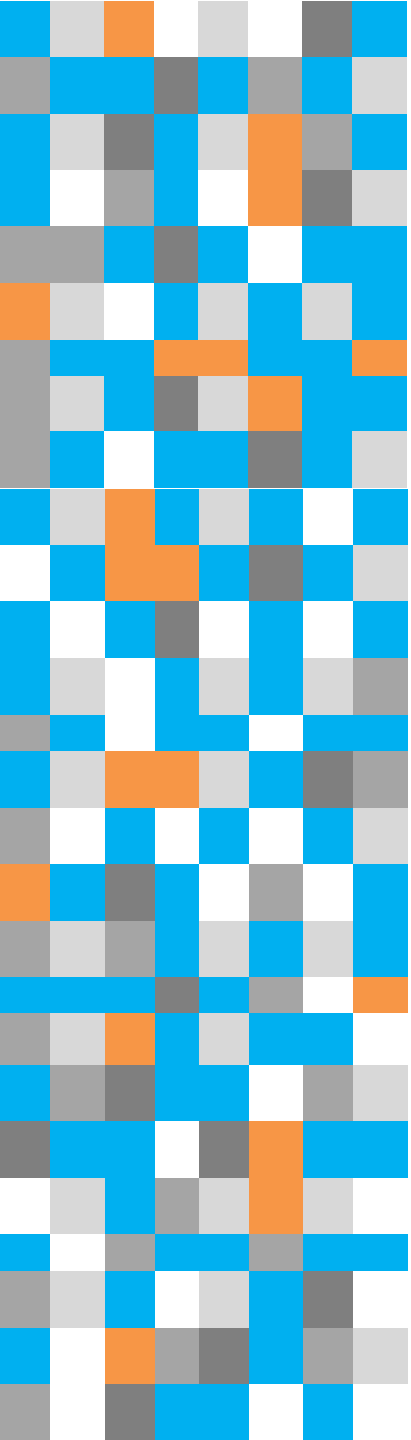
APPENDIX

(b) (7)(C)

Questions:

Can you describe the process of building an RPA platform at your agency?

What were the main challenges and lessons learned?

(b) (7)(C)

Questions:

What are the pros and cons of each of the RPA platforms (desktop, VDI, enterprise) when evaluating how to get started?

🖨 **Print**

Thank you!

Would you mind adding Ms. Nikki Burley to the Federal RPA CoP email list? I have copied her here for situational awareness.

V/r,
Liz

Elizabeth Chirico
Acquisition Innovation Lead
Office of the Deputy Assistant Secretary of the Army (Procurement)

W: (b) (6)

Email: elizabeth.a.chirico.civ@mail.mil

From: Federal Robotic Process Automation <FEDRPA@LISTSERV.GSA.GOV> **On Behalf Of** Nicholas Surkamp - BR-C
Sent: Friday, December 6, 2019 8:50 AM
To: FEDRPA@LISTSERV.GSA.GOV
Subject: [Non-DoD Source] [FEDRPA] RPA COP Community-wide Meeting - 12/6

All active links contained in this email were disabled. Please verify the identity of the sender, and confirm the authenticity of all links contained within the message prior to copying and pasting the address to a Web browser.

Hello everybody,

Excited for today's meeting! For all that cannot access the zoom, attached you will find the slides for you to follow along while on the phone.

Below are the details for joining remotely:

(b) (6)
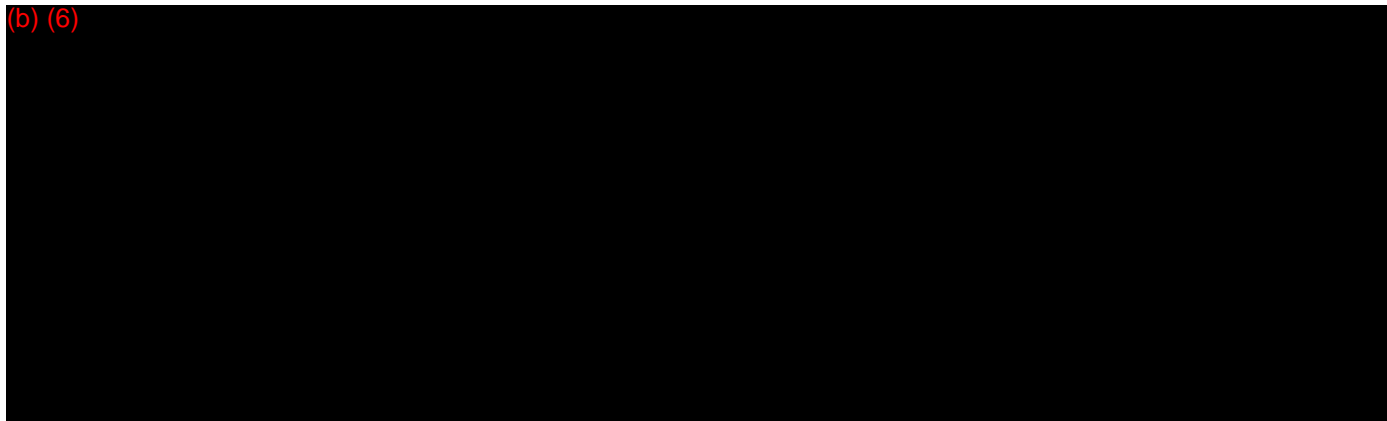
Reminder, when replying to this email, please reply directly to nick.surkamp@gsa.gov < Caution-mailto:nick.surkamp@gsa.gov > .

Regards,

Nick

To unsubscribe from the FEDRPA list, create a new email message, addressed to FEDRPA-unsubscribe-request@listserv.gsa.gov. The message content does not matter and the sender's email address will be removed from the list.